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ABSTRACT

A secondary education health assistant curriculum procedure manual for six occupational areas is presented. The six areas, the number of procedures described for each area, and an example procedure follow: nursing assistant, forty-six (assist patient to and from a wheelchair); home health assistant, six (baby holds); medical/dental offices workers, forty-one (maintain appointment book); dental assistant, fifty-six (apply saliva ejector); medical assistant, thirteen (disinfect instruments); and medical laboratory assistant, twenty-two (perform hematocrit test). Each procedure states a performance objective, safety factors, equipment and supplies needed, and steps for performing the procedure. Many of the procedures also include instructor checklists. (A brief summary of the project undertaken to develop this manual is presented at the beginning of this document.) (JH)

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FINAL REPORT

A PROCEDURE MANUAL FOR THE HEALTH ASSISTANT CURRICULUM

(Project No. 93-9022)

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PENNSYLVANIA DEPARTMENT OF EDUCATION
BUREAU OF VOCATIONAL EDUCATION
RESEARCH COORDINATING UNIT

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PREFACE

The health assistant curriculum procedure manual has been developed, using health related V-TECS catalog resources with additional procedure writing, to serve as a basic skill manual. The rewriting of procedures and the addition of equipment and safety factors to the procedures was carried out by a committee. The committee members, chosen for their expertise in health occupations education, are acknowledged for their significant professional contributions.

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In addition, recognition is given to Marguerite Savidge for her assistance in the editing and compiling of this manual.

93-9022: Health Assistant Procedure Manual

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The health assistant curriculum is the most widely taught health occupation at the secondary level in Pennsylvania. The curriculum includes instruction for dental assistant, home health assistant, medical assistant, nursing assistant, and medical laboratory assistant. The curriculum is not served by a single existing V-TECS catalog. Since the curriculum is unique to Pennsylvania, the development of such a catalog is not likely to occur.

Objective

The purpose of the project was to develop a procedure manual for the health assistant curriculum using selected existing V-TECS catalogs: Hospital Ward Clerk, Health Care Worker, Nursing Assistant, Dental Assistant, and Medical Assistant.

Method

The committee, chosen for their expertise in health occupations education, met for a three-day workshop in which they:

1. defined the major areas of the health assistant curriculum,
2. determined the major headings for each procedure,

3. selected procedures relevant to the health assistant curriculum for the existing V-TECS catalog resources,

4. revised existing procedures, and

5. added equipment and safety factors to relevant procedures.

Findings and Analysis

1. Recognizing that the health assistant curriculum prepares entry workers in a variety of health occupations, the procedure manual was divided into six (6) broad areas:

   a. Nursing Assistant,
   b. Home Health Assistant,
   c. Procedures for Medical/Dental Offices,
   d. Dental Assistant,
   e. Medical Assistant, and
   f. Medical Laboratory Assistant.

* 2. The major headings for each procedure include:

   a. Procedure
   b. Performance Objective
   c. Safety Factors
   d. Equipment and Supplies
   e. Performance Guide

3. The intent of the manual is to serve as a guide in the development of the total curriculum. Primarily it addresses the psychomotor domain and does not include the cognitive or affective domains of learning.

4. The performance guides are steps identified as subordinate to the procedure. Only one performance guide is given for each procedure although there may be several ways to attain the objective.

5. The manual has grouped procedures relevant to each area although it is recognized that overlapping does occur. No attempt has been made to sequence procedures.

*Some procedures, particularly those for medical/dental offices, may not include safety factors and equipment and supplies.

Conclusions and Recommendations

The committee recognizes its responsibility in developing a procedure manual to serve as a basic skill manual for the health assistant curriculum.

The committee recognizes the responsibility of the funding agency to provide for field testing, editing, reproduction, and state-wide dissemination of the manual.

The committee submits the following recommendations for each local educational agency:

1. Although this manual addresses only the psychomotor domain, it can be used as a base to develop the total curriculum which must include the cognitive and affective domains.

2. Health assistant teachers are encouraged to meet with their lay advisory committees to determine which of the listed procedures are relevant to their area. Additional procedures may need to be added with some of those listed deleted.

3. Performance guides may require modification because of equipment differences, availability of supplies, and/or local practice.

4. Sequencing of procedures should occur with the total curriculum development avoiding repetition of procedures that are common to more than one area of instruction.

5. If the local agency has areas of specialization, health assistant teachers are encouraged to use the appropriate V-TECS catalog for that specialty.

A PROCEDURE MANUAL FOR THE HEALTH ASSISTANT CURRICULUM

Prepared by
The Pennsylvania State University
Division of Occupational and Vocational Studies
in conjunction with the
Pennsylvania Department of Education
Bureau of Vocational Education
Research Coordinating Unit

Foreword

The health assistant curriculum procedure manual has been developed, using health related catalog resources with additional procedure writing, to serve as a basic skill manual. The compiling and rewriting of procedures was carried out by a committee. The committee members, chosen for their expertise in health occupations education, are acknowledged for their significant professional contribution.

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The committee, recognizing that the health assistant curriculum prepares entry workers in a variety of health occupations, divided the procedure manual into six broad areas: Nursing Assistant, Home Health Assistant, Medical and Dental Office Procedures, Dental Assistant, Medical Assistant, and Medical Laboratory Assistant.

The major headings for each procedure include procedure title, performance objective, safety factors, equipment and supplies, and performance guide. Some procedures, particularly those for medical and dental offices, may not include safety factors and equipment and supplies.

The intent of the manual is to serve as a guide in the development of the total curriculum. Primarily, it addresses the psychomotor domain and does not include the cognitive or affective domains of learning. The performance guides are steps identified as subordinate to the procedure. Only one performance guide is given for each procedure although there may be several ways to attain the objective. The manual has grouped procedures relevant in each area although it is recognized that overlapping does occur. No attempt has been made to sequence procedures.

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The number(s) following the performance objective relate to the references used for the specific procedure.

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SECTION I - NURSING ASSISTANT

Nursing assistants are individuals prepared to perform simple tasks relating to nursing services. They work under the supervision and direction of the licensed professional nurse or licensed practical nurse. They may answer patient's calls, help with meals and bathing, adjust beds, straighten rooms or undertake any one of a number of other tasks which are very important to the patient's comfort. Nursing assistants may be employed in hospitals, nursing homes or other nursing service areas.

The following procedures are relevant to the nursing assistant phase of the Health Assistant Curriculum.

PROCEDURE: Handwashing

Performance Objective

Given the necessary equipment and supplies, perform the handwashing procedure necessary to maintain a standard of asepsis and reduce the risk of cross infection. All items on the instructor's checklist must be acceptably completed. (1)

Safety Factors

1. Do handwashing at beginning of tour for two minutes.
2. Do handwashing for 30 seconds between patients; 60 seconds if gross contamination.

Equipment and Supplies

1. Sink with running water
2. Soap
3. Paper towels

Performance Guide

1. Remove rings and watch.
2. Wet hands and soap; leave water running.
3. Soap hands, and cover hands with lather.
4. Using friction wash palms and back of hands using rotary (circular) motions and 10 strokes for each.
5. Wash fingers and thumbs by rubbing against forefinger, or rotate by using thumb and forefinger of opposite hand. (10 strokes)
6. Rinse hands holding fingers down as water will run off the tips.
7. Dry hands thoroughly with paper towel.
8. Use paper towel to turn off faucet.
9. Discard paper towel in waste receptacle.

INSTRUCTOR CHECKLIST: Follow approved handwashing procedures.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Removed rings and watch		
2. Turned on faucet and wet hands and bar of soap; left water running		
3. Applied soap and covered hands with lather		
4. Used friction and rotary motion to wash palms and back of hands		
5. Washed in between each finger and thumb using friction and rotary motion		
6. Held hands with fingers pointed downward and rinsed off soap		
7. Dried hands thoroughly with paper towel		
8. Used paper towel to turn off faucet		
9. Discarded paper towel in waste receptacle		

*All steps must be rated acceptable.

PROCEDURE: Assist with Admission.

Performance Objective

Given the necessary equipment and supplies, assist with the admitting procedure. A checklist will be used to rate performance. All items must receive an acceptable rating. (2/3)

Safety Factors

1. Patient must sign necessary forms such as valuables.
2. Patient must have identification band in place.
3. Bed in low position.
4. Check siderails (appropriate to agency policy).

Equipment and Supplies

1. Patient Unit
2. Gown
3. Thermometer
4. Sphygmomanometer
5. Scale
6. Urine specimen container
7. Watch with second hand
8. Paper and pen

Performance Guide

1. Assemble necessary equipment in room.
2. Prepare bed by lowering and opening the bed.
3. Greet patient by name and check identification band.
4. Introduce yourself and other patients in unit.
5. Screen patient.
6. Assist patient to undress, if necessary.
7. Acquaint patient with surroundings, equipment, and schedule (i.e., call bell, bed controls, T.V. controls, hospital routine such as meals and visitors).
8. List patient's belongings; send valuables home or to safe in business office; report any unusual items.
9. Take and record patient's height, weight, temperature, pulse, respiration and blood pressure.
10. Report any unusual observation, such as bruises, sores, and rashes.
11. Obtain a urine specimen; label properly; take or send to laboratory.
12. Provide for patient's comfort and safety.
13. Visit or check on patient to aid in adjustment to the hospital.
14. Chart TPR, height, weight, urine specimen in appropriate place.
15. Report any unusual findings to appropriate person.

INSTRUCTOR CHECKLIST: Assist with unit admitting procedures.

ACTIVITY	RATING	
	Acceptable	Unacceptable
1. Prepared room for patient		
2. Introduced patient to unit		
3. Secured patient's valuables		
4. Obtained urine specimen		
5. Took patient's temperature, pulse, weight, height, respiration and blood pressure.		
6. Reported unusual observations		
7. Acquainted patient with surroundings and schedule		
8. Left patient in safe and comfortable position		
9. Charted information correctly		

PROCEDURE: Assist patient in dressing and undressing.

Performance Objective

Given the necessary equipment and supplies, assist in dressing and undressing the patient. The patient must be accorded privacy, and the procedure must be performed without undue discomfort or injury. (2)

Safety Factors

1. Remove from unaffected extremity first.
2. Put on affected extremity first.

Equipment and Supplies

1. Appropriate clothing.

Performance Guide

1. Wash hands.
2. Identify patient.
3. Provide privacy.
4. Explain procedure to patient.
5. Gather appropriate clothing.
6. Position bed properly.
7. Remove clothing, being certain to remove from unaffected extremity first.
8. Put on fresh clothing, being certain to place on affected extremity first.
9. Make patient comfortable.
10. Report observations.

PROCEDURE: Assist patient in using a bedpan.

Performance Objective

Given the necessary equipment and supplies, assist the patient in using a bedpan. The following criteria must be met:

1. The patient must be positioned on bedpan so that:
   a. patient's body is aligned and supported so that patient is not injured.
   b. linens and clothing are not soiled.
2. Appearance of excreta must be reported and be in agreement with instructor's findings. (2/3)

Safety Factors

1. Use proper body mechanics.
2. Put signal cord and toilet tissue within easy reach of patient.
3. Siderails if necessary.

Equipment and Supplies

1. Bedpan
2. Bedpan cover
3. Toilet tissue
4. Washcloth and towel

Performance Guide

1. Wash hands.
2. Collect supplies
3. Identify patient.
4. Screen patient for privacy.
5. Assist patient by flexing knees or rolling to side, if necessary.
6. Help patient onto bedpan:
   a. place bedpan under buttocks,
   b. return patient to supine position,
   c. adjust bedpan.
7. Raise head of bed, if allowed.
8. Place toilet tissue near patient.
9. Place signal cord within easy reach.
10. Remove bedpan, cover.
11. Clean anal and genital area, if necessary.
12. Allow patient to wash hands.
13. Check appearance of excreta and report any abnormal findings.
14. Empty contents as instructed
15. Clean and store supplies.
16. Wash hands.

PROCEDURE: Assist patient in using urinal.

Performance Objective

Given the necessary equipment and supplies, offer the urinal to the patient. The urinal must be administered in a manner to avoid embarrassment and soiling of bed linens and patient's clothing. (2/3)

Safety Factors

1. Use proper mechanics.
2. Put signal cord within easy reach.
3. Siderails if necessary.
4. Do not place urinal on bedside stand or over the bed table.

Equipment and Supplies

1. Urinal
2. Urinal cover
3. Washcloth and towel

Performance Guide

1. Wash hands.
2. Collect supplies.
3. Identify patient.
4. Screen patient for privacy.
5. Position patient in comfortable position, according to instructions.
6. Offer or place urinal.
7. Place signal cord within easy reach.
8. Remove urinal and cover.
9. Allow patient to wash hands.
10. Check appearance of urine.
11. Empty urinal according to instructions.
12. Clean and store supplies.
13. Wash hands.

PROCEDURE: Give or assist patient in taking bath.

Performance Objective

Given the necessary equipment and supplies, administer a complete bed bath to a patient. The following criteria must be met:

1. Patient is accorded privacy and comfort.
2. Patient is clean.
3. There is strict adherence to rules regarding safety of patient. (2)

Safety Factors

1. Bath water 110°-115° degrees.
2. Use siderails if indicated.
3. Never allow patient to sit on side of bed for back care.
4. Note any unusual marks or pressure areas on the body.

Equipment and Supplies

1. Bath linens
2. Bath thermometer
3. Soap
4. Deodorant or powder
5. Lotion
6. Orange stick
7. Clean gown

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Gather equipment.
5. Check temperature of room and eliminate drafts.
6. Raise bed to working height.
7. Provide for privacy.
8. Place bath blanket over patient.
9. Fanfold bed linen to foot of bed - do not expose patient.
10. Prepare bath water at 110-115 degrees F.
11. Remove gown or pajamas.
12. Place face towel across chest.
13. Form wash cloth into mit over hand.
14. Wash eye area from inner part to outer part, rinse and dry.
15. Wash and dry face and neck; use soap only if desired by the patient.
16. Place bath towel under arm on farthest side from you and wash with long strokes giving extra attention to axilla, rinse and dry well.
17. Place hand in basin, soak and give nail care if necessary.
18. Wash other arm in same manner.
19. Use deodorant or powder.
20. Place towel over chest and fanfold blanket to waistline.
21. Wash, rinse and dry chest and breast using a circular motion without exposing.
22. Fold blanket to pubic bone and wash, rinse and dry lower abdomen. Replace blanket.
23. Place towel lengthwise under farthest leg and tuck bath blanket around upper leg to prevent draft or exposure.
24. Place basin on bed and put foot into it.
25. Wash and rinse leg from hip to knee.

(continued on next page)

Performance Guide (continued)

26. Wash and rinse from knee to foot.
27. Wash foot - dry very thoroughly.
28. Wash, rinse and dry other leg and foot the same way. Apply lotion.
29. Obtain fresh water, 110-155 degrees F.
30. Turn patient to side, close to you for good body mechanics.
31. Wash back with long, soothing strokes. Rinse and dry.
32. Give back rub according to procedure.
33. Wash, rinse and dry perineal area.
34. Put on clean gown or pajamas.
35. Place bed in low position.
36. Attach signal bell and bedside table within reach.
37. Leave patient comfortable in good alignment.
38. Clean and replace bath equipment.
39. Damp dust over bed table and bedside stand.
40. Tidy unit - remove old papers.

PROCEDURE: Tub Bath

Performance Objective

Given the necessary equipment and supplies, assist the patient in taking a tub bath. The patient must be clean and uninjured upon completion of the bath. (5)

Safety Factors

1. Conditions may warrant special considerations:
   a. Safety rails
   b. Stool in tub with special shower
   c. Getting out of tub on hands and knees.

Equipment and Supplies

1. Bath linens
2. Bath thermometer
3. Soap
4. Deodorant or powder
5. Lotion
6. Orange stick
7. Clean gown

Performance Guide

1. Wash hands.
2. Assemble equipment and supplies. Clean bathtub.
3. Identify patient and explain procedure. Escort to bathroom and seat on chair.
4. Fill tub 1/3 full with water (100°-115°F or 37.7°-46.1°C.)
5. Place non-skid material in bottom of tub.
6. Place "OCCUPIED" or "TREATMENT IN PROGRESS" sign on door.
7. Assist patient to undress as needed.
8. Assist patient into tub providing support to avoid slipping.
9. Place portable call signal on straight-back chair at side of tub if wall signal is not present. Patient may be left alone only if condition permits. Remain close at hand.
10. Check patient at frequent intervals.
11. Assist patient in bathing, if necessary.
12. Upon completion of bath, assist patient in stepping from tub.
13. Assist with drying and dressing, if necessary.
14. Accompany patient to his/her bed.
15. Provide for patient's comfort.
16. Restore bathtub facilities to useable condition and place soiled clothing and linens in proper receptacles.
17. Remove "OCCUPIED" signs and replace with "UNOCCUPIED" sign.
18. Record pertinent observations.

PROCEDURE: Give backrub and massage.

Performance Objective

Given the necessary equipment and supplies, give a backrub to the patient. The following criteria must be met:

1. Circular motions and long, smooth strokes must be used.
2. The student's findings must agree with the instructor's findings with regard to any abnormal skin conditions. (2/3)

Safety Factors

1. Use siderails as necessary.
2. Report any abnormal skin conditions.
3. Always have patient lying down.

Equipment and Supplies

1. Bath linens
2. Bath lotion and powder

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Provide patient privacy.
5. Place bed in high position.
6. Move patient to near side of bed in prone or Sims position.
7. Stand with feet 12 inches apart, with one foot in front of the other, facing head of bed.
8. Wash and dry back.
9. Place lotion in palms of hands.
10. Rub neck with fingers, using circular motions to the hairline.
11. Place hands on sacral area, and rub midline toward the neckline with long, smooth strokes.
12. Continue down sides toward sacrum with broad circular motions.
13. Continue with long, smooth strokes over the entire back from shoulders to sacrum.
14. Continue rubbing for 3-5 minutes, until all lotion is absorbed.
15. Apply powder to hands, and apply long, smooth strokes over back from shoulders to sacrum.
16. Check for and report all broken and reddened areas.
17. Replace equipment.
18. Leave patient in comfortable position.
19. Wash hands.

PROCEDURE: Brush and/or comb hair.

Performance Objective

Given the necessary equipment and supplies, groom the patient's hair. The hair must be neat and free of tangles. (5)

Safety Factors

If patient has had a head wound or sutures, check with appropriate person regarding procedure.

If patient has had eye surgery, check with appropriate person regarding procedure.

Equipment and Supplies

1. Comb
2. Brush
3. Alcohol
4. Towel

Performance Guide

1. Assemble equipment
2. Identify patient and explain procedure.
3. Wash hands.
4. Place towel over pillows or patient's shoulders.
5. Turn patient's face away.
6. Remove tangles gently without pulling or breaking hair by combing or brushing, beginning at ends and working toward scalp. Use alcohol solution as necessary for tangles.
7. Brush or comb hair as follows. Consult patient as to style.
   a. Divide tangled hair into small sections.
   b. Wet matted hair with alcohol solution to facilitate combing.
   c. Hold hair firmly above matted area to comb.
   d. Part and arrange hair according to wishes of patient.
8. Remove towel.
9. Clean brush and comb and return them to storage area.
10. Wash hands.
11. Report procedure.

PROCEDURE: Care of toenails and fingernails.

Performance Objective

Given the necessary equipment and supplies, give toenail and fingernail care. The nails must be clean and trimmed to a length to allow white to show under the entire end of the nail, there must be no rough edges, skin breaks or irritations. (2/3)

Safety Factors

1. Observe for redness, cyanosis, hangnails, infection or signs of ingrowing.
2. Prevent damage to cuticle
3. DO NOT DO PROCEDURE ON DIABETIC PATIENT

Equipment and Supplies

1. Orangewood stick
2. Basin of warm soapy water
3. Blunt scissors
4. Lotion
5. Towels
6. Nailfile

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Soak hands or feet in warm soapy water.
5. Push back softened cuticle with orangewood stick.
6. Clean under nails with orangewood stick.
7. Dry hands, or feet.
8. Cut or file nail straight across, if needed.
9. Apply lotion if skin is dry.
10. Wash hands.
11. Report procedure.

PROCEDURE: Assist with oral hygiene.

Performance Objective

Given the necessary equipment and supplies, assist a conscious bed patient with oral hygiene. The oral cavity must be thoroughly cleansed. (2)

Safety Factors

1. Offer oral hygiene after each meal.

Equipment and Supplies

1. Toothbrush
2. Toothpaste
3. Mouthwash
4. Glass
5. Emesis basin

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Place equipment on overbed table in front of patient.
5. Moisten toothbrush and apply toothpaste.
6. Allow patient to brush teeth.
7. Offer water from glass and allow patient to rinse mouth into emesis basin as often as desired.
8. Allow patient to rinse mouth with mouthwash if desired.
9. Clean and replace equipment.
10. Leave patient clean and comfortable.
11. Wash hands.

PROCEDURE: Giving oral hygiene.

Performance Objective

Given the necessary equipment and oral hygiene supplies, assist a helpless patient with complete mouth care. The oral cavity must be thoroughly cleansed. (2)

Safety Factors

1. No liquids to be used on unconscious patients.
2. Report any sores or unusual odors.

Equipment and Supplies

1. Petroleum jelly
2. Oral swabs
3. Toothbrush
4. Toothpaste
5. Glass
6. Mouthwash
7. Emesis Basin

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Gather equipment and place on table near bed.
5. Turn patient's head to one side.
6. Place towel and emesis basin under chin.
7. Cleanse entire mouth with swabs.
8. Rinse mouth with small amounts of liquid; allow solution to drain into emesis basin (except for unconscious patients).
9. Lubricate lips with petroleum jelly.
10. Clean and replace equipment.
11. Leave patient clean and comfortable.
12. Wash hands.

PROCEDURE: Assisting with oral hygiene and denture care.

Performance Objective

Given the necessary equipment and supplies, clean the dentures and provide oral hygiene. Dentures must be clean. (2/3)

Safety Factors

1. Check sides and roof of mouth. Tongue must be thoroughly cleansed.
2. Fill sink with water to cushion teeth if dropped.
3. Hold dentures firmly. Do not drop.

Equipment and Supplies

1. Toothbrush
2. Toothpaste
3. Mouthwash
4. Oral swabs
5. Emesis Basin
6. Glass

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Ask patient to remove dentures or remove dentures if patient is unable to do so.
5. Place dentures in basin and take to sink.
6. Fill sink with water.
7. Brush dentures, down on upper teeth and up on lower teeth.
8. Rinse dentures with running water.
9. Allow patient to rinse mouth with mouthwash.
10. Using toothbrush or oral swabs cleanse tongue, sides of cheek and roof of mouth.
11. Let patient put dentures in mouth or do it for patient.
12. Dry patient's mouth and hands.
13. Wash hands.

PROCEDURE: Shaving the male patient.

Performance Objective

Given the necessary equipment and supplies, shave the patient with a safety razor. (2)

Safety Factors

1. Avoid cuts or scratches.
2. Shave in direction of hair growth.

Equipment and Supplies

1. Safety razor
2. Shaving Cream
3. Aftershave
4. Towels

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Gather equipment.
5. Elevate head of bed, if permitted.
6. Place towel across chest.
7. Moisten and lather face, being careful not to allow lather to get into the eyes.
8. Shave, using short, smooth strokes and holding skin taut.
9. Start in front of the ear and work toward chin.
10. Continue on other side until all lather is removed.
11. Rinse razor frequently.
12. Lather neck and shave upward toward the chin.
13. Wash, rinse, and dry the face.
14. Apply aftershave lotion or powder.
15. Clean and store equipment.
16. Leave patient clean and comfortable.
17. Wash hands.

PROCEDURE: Assist with active range of motion exercises.

Performance Objective

As instructed by physician's orders, assist patient with range of motion exercises. (5)

Safety Factors

1. Support body parts while exercising.
2. Do not permit the patient to become fatigued.

Performance Guide

1. Identify patient and explain procedure.
2. Wash hands.
3. Position patient.
4. Support patient's head.
   a. Flex and extend neck to point of resistance.
   b. Rotate neck in same manner.
5. Exercise shoulder. Support arm at elbow and wrist.
   a. Flex and extend.
   b. Rotate internally and externally.
   c. Abduct and adduct.
6. Exercise elbow. Support above elbow and at wrist.
   a. Flex and extend.
   b. Pronate and supinate.
7. Exercise wrist.
   a. Hyperextend.
   b. Extend.
   c. Flex.
8. Exercise fingers and thumb.
   a. Rotate thumb.
   b. Flex and extend fingers.
   c. Abduct and adduct fingers.
9. Exercise hip and knee. Support under knee and heel.
   a. Flex and extend hip and knee.
   b. Abduct and adduct hip.
   c. Rotate internally and externally.
10. Exercise ankle and foot.
    a. Flex and extend supporting leg above ankle.
    b. Rotate ankle, supporting ankle from the top of the leg.
11. Exercise other side of body in same manner.
12. Provide for patient's comfort.
13. Record procedure.

PROCEDURE: Applying restraints.

Performance Objective

Given the proper restraints, apply the restraints to the patient without causing undue physical discomfort. The restraint must be applied snugly and restrict movement of the applicable body part. (6)

Safety Factors

1. Check temperature, color, and mobility of all extremities.
2. Massage bony prominences and any reddened areas caused by use of the restraint.

Equipment and Supplies

1. Restraint

Performance Guide

1. Check order and employer regulations before applying restraints.
2. Wash hands.
3. Obtain restraint(s).
4. Identify patient and explain procedure to patient and family.
5. Provide for patient's privacy.
6. Apply restraint(s) snugly and gently. Check patient frequently for comfort and circulation and change position at least every two hours.
7. Provide for patient's safety.
8. Record procedure.

PROCEDURE: Care of the incontinent patient.

Performance Objective

Given the necessary equipment and supplies, clean the incontinent patient. Skin and gown must be clean and dry. Bed linens must be clean and neatly arranged. Skin condition requiring attention must be reported. (6)

Safety Factors

1. Check bony prominences.
2. Check genital area and buttocks for skin breakdown.

Equipment and Supplies

1. Bath linens
2. Lotion
3. Toiletpaper
4. Clean gown

Performance Guide

1. Wash hands.
2. Assemble necessary linens and supplies.
3. Position patient and remove solid feces with toilet tissue and discard in designated receptacles.

   NOTE: When caring for the incontinent patient, it is important not to judge or scold patient. Make every effort to maintain privacy and modesty.

4. Wash soiled area with soap and water, cleansing from front to back.
5. Rinse and dry thoroughly.
6. Change gown and/or linen as necessary.
7. Wash hands.
8. Report amount and character of elimination and any signs of skin breakdown.

PROCEDURE: Make occupied bed.

Performance Objective

Given the necessary linens, make an occupied bed. (2/8)

Safety Factors

1. Use siderails.
2. Avoid pressure over toes.

Equipment and Supplies

1. Bed linens

Performance Guide

1. Wash hands.
2. Collect necessary supplies and stack linen in order of use.
3. Provide for patient's privacy.
4. Describe procedure to patient.
5. Position bed in high, flat position, if allowed.
6. Move patient to one side of bed raising siderail on that side.
7. Remove foundation linens (one side).
8. Make the foundation of the bed (one side).
9. Put siderail up on completed side.
10. Move patient to clean side of bed.
11. Position pillow under patient.
12. Move to the other side of the bed, lower siderail and pull dirty linen through with clean foundation linen.
13. Complete bed as on finished side.
14. Reposition patient.
15. Place top linens over patient pulling dirty top layer out underneath clean top linens.
16. Miter bottom corners after making top pleat.
17. Change pillow case by gathering clean case down to corners and pulling up over pillow. Pleat for good fit.
18. Place pillow in comfortable position, with attention to good body alignment.
19. Attach signal cord.
20. Adjust siderails.
21. Return bed to low position.
22. Removed soiled linen.
23. Wash hands.

PROCEDURE: Make unoccupied bed.

Performance Objective

Given the necessary linens and a hospital bed, make an unoccupied bed. The corners of the sheets must be tightly fitted and wrinkle free. (2/8)

Safety Factors

Good body mechanics.

Equipment and Supplies

1. Bed linens

Performance Guide

1. Wash hands.
2. Collect necessary supplies and stack linen in order to be used.
3. Adjust bed to proper height and flat position.
4. Strip bed, holding dirty linen away from body, and dispose of soiled linen.
5. Make foundation of bed (one side).
6. Make top bedding portion of the bed (on the same side).
7. Complete bed making by completing the other side, (foundation and top).
8. Fanfold covers to bottom of bed, if patient will soon occupy.
9. Prepare and place pillows on bed.
10. Attach signal cord.
11. Lower bed and set brake.
12. Wash hands.

PROCEDURE: Make the postoperative or recovery bed.

Performance Objective

Given the necessary linens and a hospital bed, make a recovery bed. (2/8)

Safety Factors

Equipment and Supplies

1. Bed linens

Performance Guide

1. Wash hands.
2. Collect necessary supplies.
3. Raise bed to proper height.
4. Strip bed holding dirty linen away from body, and dispose of soiled linen.
5. Make the foundation of the bed (one side).
6. Place top bedding on bed (one side).
7. Complete the foundation portion of the bed.
8. Finish top and bottom edges of top bedding; fan-fold top bedding lengthwise to the side of the bed opposite from the door of the room or widthwise to bottom of bed.
9. Insert pillow in pillow case and place on bed.
10. Attach signal cord.
11. Place bed in correct position and set brake.
12. Place pull sheet and/or underpads on bed, if necessary.
13. Place specified equipment in room such as I.V. pole, stethescope, and blood pressure cuff.

PROCEDURE: Prepare and assist patient in eating.

Performance Objective

Given the necessary supplies, prepare and assist patient to eat. (2/8)

Safety Factors

Caution patient regarding hot coffee cups or containers.

Equipment and Supplies

1. Oral hygiene equipment
2. Food tray

Performance Guide

1. Wash hands.
2. Identify patient.
3. Provide for patient to wash face and hands.
4. Allow patient to brush teeth. (Optional)
5. Position patient.
6. Provide an attractive environment.
7. See that proper tray is served to patient.
8. Assist with cutting items, buttering bread, opening packets, and pouring beverages.
9. Remove items when patient has completed meal.
10. Provide for patient elimination.
11. Wash hands.
12. Provide for patient to wash face, hands, and brush teeth.
13. Adjust bed.
14. Record observations.

PROCEDURE: Feed patient (adult).

Performance Objective

Given the necessary equipment and supplies, serve food and feed an adult patient. (2/8)

Safety Factors

1. Make sure correct food tray is fed to patient.
2. Avoid spilling food.
3. Alternate solids and liquids.

Equipment and Supplies

1. Wash basin
2. Food tray

Performance Guide

1. Wash hands.
2. Identify patient.
3. Provide for patient elimination.
4. Wash hands again.
5. Wash patient's hands and face.
6. Provide for oral hygiene.
7. Position patient.
8. Protect patient's clothes and bed linens.
9. See that proper tray is served to patient.
10. Sit while you feed patient.
11. Determine food preferences.
12. Serve food if acceptable to patient and rotate food offered.
13. Alternate food and liquid (1:3 or 1:4).
14. Remove food tray.
15. Provide for patient elimination.
16. Wash hands.
17. Wash patient's hands and face.
18. Provide for oral hygiene.
19. Position patient comfortably.
20. Record observations.

PROCEDURE: Observe, measure and report food and fluid intake.

Performance Objective

Given food and fluids to be distributed to patients on intake-output and equivalent chart, observe, measure and report the amount of intake. (2)

Safety Factors

1. Instruct patient that all fluids must be measured.
2. Measure and record accurately.

Equipment and Supplies

1. Fluids
2. Graduated container
3. Intake and output record

Performance Guide

1. Obtain list of measurements of common containers used in the hospital.
2. Identify those items which are considered fluids.
3. Pour fluids up to the container's capacity.
4. Identify patient.
5. Inform patient of intake-output procedure.
6. Distribute food and fluids.
7. Observe amount of fluid left in container after patient has finished drinking.
8. Record the difference between the container's capacity and amount left in container.
9. Record on worksheet the total amount taken after each meal and after each fluid intake.
10. Report total to the charge nurse at the end of an 8-hour shift.

PROCEDURE: Observe, measure and report output of patient.

Performance Objective

Given the necessary supplies, observe, measure and report output of patient. (2)

Safety Factors

1. Collect output in appropriate manner.
2. Measure, observe and record accurately.

Equipment and Supplies

1. Bedpan or urinal
2. Graduated container
3. Output record

Performance Guide

1. Wash hands.
2. Identify patient.
3. Inform patient of intake-output procedure.
4. Collect output in a manner appropriate to patient's condition and sex.
5. Measure output in a graduate.
6. Observe output.
7. Record amount of output on worksheet.
8. Dispose of output.
9. Rinse receptacles in cold water; then wash.
10. Wash hands.
11. Record total measurement on worksheet and report to charge nurse at the end of an 8-hour shift.

PROCEDURE: Assist patient to dangle.

Performance Objective

Given a patient, assist the patient to dangle. (2/8)

Safety Factors

1. Good body techniques must be used in moving the patient.
2. Patient's body must be supported and good body alignment maintained.
3. Patient must be attended at all times.
4. No pressure on popliteal space while dangling.

Equipment and Supplies

1. Bath blanket
2. Watch with second hand

Performance Guide

1. Wash hands.
2. Assemble designated supplies.
3. Identify patient.
4. Explain the procedure and check pulse.
5. Elevate head of bed gradually.
6. Drape patient with bath blanket, and position top bed covers to foot of bed.
7. Place one arm under the patient's knees and the other one under the shoulders of the patient.
8. Turn patient slowly toward edge of bed using good body mechanics, allowing patient's legs to hand over the side of the bed.
9. Check patient's pulse.
10. Instruct patient to swing legs.
11. Dangle for designated length of time, remaining with patient throughout (should faintness occur, return patient to bed position, and report to supervisor immediately).
12. Return patient to bed position.
13. Recheck patient's pulse.
14. Make patient comfortable.
15. Record observations and procedures.

PROCEDURE: Assist patient to ambulate.

Performance Objective

Given a patient in a weakened condition, ambulate the patient. (6)

Safety Factors

1. Patient movements must be coordinated.
2. The patient must be assisted in a manner to insure his/her safety and comfort.
3. The patient must not be fatigued.

Equipment and Supplies

1. Watch with second hand
2. Robe and slippers

Performance Guide

1. Check floor path to be sure it is dry and clear.
2. Elevate head of bed 30°
3. Lower bedframe to lowest possible position. Lock wheels if old bed. Provide footstool, if necessary.
4. Take pulse and respiration.
5. Place one hand on patient's proximal shoulder and the other hand under his/her distal axilla. Place patient's hands on own shoulders, then pull up to a sitting position.

   NOTE: The first time a patient is ambulated, two persons are required to provide support in case of fainting.

6. Reach behind patient's distal knee with other hand and swing legs off the bed, while pivoting patient's body in that direction at the same time.
7. Have patient dangle feet over side of bed for a few minutes to prevent dizziness when ambulating.
8. Assist the patient to put on robe and slippers.
9. Help the patient to stand. Place hands under the patient's axillae and pull to standing position.
10. Stand at side and hold on to arm or shoulder for support as patient stands and gains balance.
11. Assist the patient to walk. Provide support by walking at side.
    a. For minimal support, have patient hold arm or elbow.
    b. For moderate support, hold patient's left hand with left hand and with right hand hold patient around waist.
    c. For more than moderate support, have additional person assist to provide support at each side.
12. Assist the patient to return to bed. Stop short of fatigue.

(continued on next page)

Performance Guide (continued)

13. Have patient stand at bedside and pivot so that back is to the edge of the bed.
14. Assist patient to a sitting position on side of bed by supporting with hand under patient's axilla.
15. Assist patient in removal of robe and slippers.
16. Help patient swing feet onto bed:
    a. Support patient at shoulders with one hand.
    b. Grasp patient with other hand under both knees and pivot legs onto bed.
17. Recheck pulse and respiration.
18. Adjust top covers of bedding and pillows to promote patient comfort.

PROCEDURE: Assist patient in walker use.

Performance Objective

Given a patient who needs support while walking and a walker, assist the patient to use walker without falling or slipping. (2)

Safety Factors

Start with small steps to avoid going too fast.

Equipment and Supplies

1. Walker
2. Robe and slippers

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Place bed in low position or provide a footstool.
5. Elevate head of bed gradually.
6. Get patient into sitting position and "dangle" unless it is not advised. (See dangle procedure)
7. Position walker with open end toward patient.
8. Steady the walker with hands and one foot.
9. Allow patient to stand, using the rails of the walker for support.
10. Position back support of walker, if appropriate.
11. Allow patient to walk slowly, using the walker for support.
12. Return patient to bed.
13. Leave patient comfortable and in good body alignment.
14. Report procedure and observations.

PROCEDURE: Transfer patient using mechanical lifts.

Performance Objective

Given the necessary equipment, transfer an assigned patient from a bed to a chair using a mechanical lift. (6)

Safety Factors

Patient must be moved smoothly and safely without injury.

Equipment and Supplies

Mechanical Lift

Performance Guide

1. Wash hands and explain procedure to patient.
2. Position chair near bed with enough space to maneuver the mechanical lift. Explain procedure as steps are taken to reassure patient.
3. Place mechanical lift perpendicular to the bed with wheels under bed.
4. Adjust the lifting bar over the bed.
5. Close the hydraulic pressure valve.
6. Position one sling strap under thighs even with back of knee.
7. Position second sling strap under back below the level of the axilla.
8. Fasten both sling straps to the lifting bar.
9. Pump hydraulic handle to raise the lifting bar until patient's body clears bed.
10. Roll lifter to the chair while second worker guides patient in sling over chair.
11. Release hydraulic pressure valve to lower patient into chair in a sitting position.
12. Unhook straps of sling and remove them from under the patient.

    NOTE: Support patient's head in transfer procedure as needed.

13. To return patient to the bed, reverse the procedure.

PROCEDURE: Assist patient to and from a wheelchair.

Performance Objective

Given a wheelchair, assist the patient in moving to and from the wheelchair. (2)

Safety Factors

1. Good body mechanics must be observed.
2. The patient must be moved to and from wheelchair in a safe manner consistent with patient's condition.

Equipment and Supplies

1. Wheelchair
2. Blanket

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Check wheelchair for mechanical defects.
5. Bring appropriate size wheelchair to bedside.
6. Position wheelchair at foot of bed facing head of bed; set the brakes; and raise the foot rest.
7. Place bed in low position.
8. A PATIENT WHO CAN STAND:
   a. allow patient to dangle.
   b. assist patient to standing position.
   c. have patient pivot and lower body into chair.
   d. reverse the procedure to move patient from wheelchair to bed.
9. A PATIENT WHO CANNOT STAND:
   a. obtain the help of two other people.
   b. move the patient to the near side of the bed.
   c. have assistants take their places; one at head and shoulders, one at hips and one at feet.
   d. using good body mechanics at the count of three, transfer the patient into the wheelchair with all helpers moving together.
   e. make patient comfortable, and cover legs with blanket.
   f. transfer the patient from wheelchair to bed by reversing the above procedure.
10. Leave patient comfortable and in good alignment.
11. Replace equipment.
12. Report procedure and any problems or symptoms encountered.

PROCEDURE: Transport patient by wheelchair.

Performance Objective

Given a patient to be moved in a wheelchair, transport patient through a doorway, onto an elevator and around corners. (2)

Safety Factors

Do not permit doors to close before completing procedure.

Equipment and Supplies

Wheelchair

Performance Guide

1. Transfer to wheelchair using proper procedure.
2. Approach closed doorway backwards.
3. Use one hand to open door.
4. Pull chair through backwards.
5. Turn wheelchair to forward after getting through door.
6. Pull wheelchair onto elevator backwards.
7. Turn chair around and leave elevator pulling wheelchair backwards.
8. Make a right turn by exerting more pressure on the left handle; reverse procedure for left turn.
9. Make all turns carefully and smoothly to avoid stress or danger to the patient.

PROCEDURE: Move patient between a stretcher and a bed using three-man lift or transfer sheet.

Performance Objective

Given a patient who must be transferred from a stretcher to a bed, assist in moving the patient, using the three-man lift or transfer sheet. (2)

Safety Factors

1. Patient must be moved in a safe manner consistent with patient's condition.
2. Good body mechanics must be observed.

Equipment and Supplies

1. Stretcher
2. Blanket

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Get help of two other people.
5. THREE-MAN LIFT
   a. place stretcher at 45° angle to bed with head of stretcher near foot of bed.
   b. lock stretcher.
   c. assume position: one person at head, one at hips and one at legs -- slide arms under patient.
   d. have all helpers use good body mechanics by placing feet twelve inches apart, one foot in front of the other, bend knees, and keep back straight.
   e. have each helper slip arms underneath patient's body.
   f. lift and roll patient's body to chest at count of three.
   g. have group pivot to bed and gently place patient in bed comfortable and in good body alignment.
6. TRANSFER SHEET
   a. place stretcher parallel to bed. Lock Stretcher.
   b. assume correct positions: one on each side of the bed and one at the head; grasp transfer sheet, using good body mechanics.
   c. gently slide patient onto stretcher, placing comfortably and in good body alignment.
7. TRANSPORT
   a. place safety straps across patient or raise siderails, being sure hands and arms do not protrude.

(continued on next page)

Performance Guide (continued)

b. walk at head of stretcher.
c. proceed with caution and protect patient's head.
d. secure elevator door!
e. enter elevator foot end first, and stand at patient's head.
f. leave elevator by pulling stretcher head first.
g. approach corners on right hand side of hallway; proceed slowly and cautiously.

8. Return to bed following appropriate transfer method listed in #5 or #6.
9. Put siderails up.
10. Replace equipment.

PROCEDURE: Shampoo patient's hair

Performance Objective

Given the necessary equipment and supplies, shampoo the patient's hair. The shampoo must leave the hair clean and free of soap and tangles. The patient's hair must be left dry. (6/7)

Safety Factors

1. Room must be free of drafts.
2. Protect eyes and ears with proper materials.

Equipment and Supplies

1. Waterproof drape
2. Shampoo
3. Towels
4. Cotton balls
5. Pitcher and warm water
6. Comb and brush

Performance Guide

1. Check work order.
2. Assemble all materials.
3. Identify patient and explain procedure.
4. Provide for protection of bed and floor by covering with waterproof drape.
5. Check to be sure room is warm and free of drafts.
6. Protect patient's eyes and ears.
7. Provide for continuous drainage of shampoo water by positioning waterproof trough under head and draping into basin.
8. Moisten hair with water.
9. Apply shampoo.
10. Rinse well and towel dry.
11. Comb out tangles starting at end and working toward crown.
12. Thoroughly dry hair.
13. Tidy area. Leave patient comfortable.
14. Record procedure, time, method, and any unusual observations or reactions.

PROCEDURE: Give skin care to patient with decubitus ulcers.

Performance Objective

Given the necessary equipment and supplies, administer skin care to patient with decubitus ulcer. (2)

Safety Factors

1. Turn patient every two hours using good body mechanics and alignment.
2. Protect pressure points by using lambs wool.
3. All bony prominences and reddened areas must be massaged.

Equipment and Supplies

1. Bath linens
2. Lotion
3. Soap
4. Water

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Check patient for cleanliness and dryness.
5. Turn patient to side.
6. Observe skin color for signs of tissue breakdown, i.e., red, blue, or mottled.
7. Give back rub.
8. Change patient's position.
9. Massage bony prominences and any reddened areas.
10. Position patient off decubitus areas.
11. Leave patient comfortable, clean, dry, and in good alignment.
12. Wash hands.
13. Report procedure and observations.

PROCEDURE: Give skin care to a patient in cast and/or traction.

Performance Objective

Given the necessary equipment and supplies, administer skin care to the patient in a cast or traction. (2)

Safety Factors

1. All reddened areas must be massaged.
2. Any rough edges of cast must be reinforced.
3. Keep traction constant.
4. Traction ropes must be hanging free.

Equipment and Supplies

1. Bath linens
2. Powder
3. Stockinette
4. Tape

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Provide privacy.
5. Adjust bed to high position.
6. Check to be sure patient is in good body alignment.
7. Check for signs of impaired circulation, i.e., discoloration, coldness, pain, numbness or edema.
8. Smell and feel cast for indications of skin breakdown.
9. Check edges of cast for roughness.
10. Reinforce edges of cast with stockinette or tape as needed.
11. Check for redness of skin caused by irritation of cast or traction apparatus.
12. Use pillows to prevent pressure areas and maintain good alignment of the extremity.
13. Check traction ropes to make certain they are hanging free and are providing adequate pull.
14. Turn patient as permitted, and give back care.
15. Check entire body for reddened areas and massage as needed.
16. Straighten linens.
17. Leave patient clean, dry, and in good body alignment.
18. Wash hands.
19. Report procedure and any pertinent observations.

PROCEDURE: Apply hot water bottle.

Performance Objective

Given the necessary equipment and supplies, fill and apply the hot water bottle to the affected area. The hot water bottle must be applied to the designated area without burning the patient even if the bottle should break. (2/3)

Safety Factors

1. Do not use hot water bottle on aged, unconscious, or diabetic patients.
2. Check skin area for redness often.
3. Refill as necessary to maintain adequate heat.

Equipment and Supplies

1. Thermometer
2. Hot water bottle
3. Hot water bottle cover

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Fill hot water bottle 1/3 to 1/2 full of water. (105°-120° for adults and 105°-110° for children).
5. Expel excess air from hot water bottle.
6. Place hot water bottle on affected area with one layer of covering between bottle and patient.
7. Position patient so heat is not confined.
8. Check patient's skin at intervals. (10-20 minutes).
9. Remove hot water bottle; empty and allow to dry. Leave air in bottle to keep sides from sticking together.
10. Report procedure and patient's response.

PROCEDURE: Apply heating pads.

Performance Objective

Given the necessary equipment and supplies, apply dry heat to the designated area. (2/3)

Safety Factors

1. Do not use heating pad on aged, unconscious, or diabetic patient.
2. Check skin area for redness often.

Equipment and Supplies

Electric heating pad

Performance Guide

1. Wash hands.
2. Identify patient.
3. Turn on and check heating pad with hand.
4. Explain procedure.
5. Instruct patient in safety precautions.
6. Place electric pad on designated area, making sure that there is one layer of material between pad and patient.
7. Check skin during and after treatment.
8. Remove electric pad at end of treatment.
9. Report procedure.

PROCEDURE: Apply ice bags.

Performance Objective

Given the necessary equipment and supplies, fill and apply ice bag to the affected area. The ice bag must cover the designated area and remain in place the prescribed length of time. (2/3)

Safety Factors

1. Check skin area for paleness, bluish tinge, swelling, pain, numbness or tingling.

Equipment and Supplies

1. Ice bag
2. Ice bag cover

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Fill ice bag to 1/3 to 1/2 full.
5. Remove air and close top securely. Check for leakage.
6. Apply protective cover.
7. Protect patient and bed linen from dampening.
8. Place ice bag on affected area with protective cover between bag and patient.
9. Check patient often, observing skin area for paleness, bluish tinge, tingling, swelling, pain or numbness.
10. Remove bag at end of designated treatment time.
11. Empty, rinse and dry.
12. Inflate container with air and store.
13. Report treatment.

PROCEDURE: Insert rectal tube.

Performance Objective

Given the necessary equipment and supplies, insert a rectal tube. (2/3)

Safety Factors

1. Insert rectal tube four inches.
2. The rectal tube should not remain in place more than thirty minutes.

Equipment and Supplies

1. Rectal tube
2. Lubricant
3. Towel

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Position patient on side with one knee flexed.
5. Lubricate tube.
6. Encourage patient to take deep breath as tube is inserted.
7. Insert tube about 4 inches.
8. Wrap free end of tube in towel.
9. Remove tube in 30 minutes or less.
10. Clean patient's rectal area.
11. Clean up supplies.
12. Wash hands.
13. Report procedure and result of procedure.

PROCEDURE: Prepare and give an enema.

Performance Objective

Given the necessary equipment and supplies, prepare and give an enema. (2/3)

Safety Factors

1. Be sure rectal tube opening is free of lubricant.
2. Insert tube gently.
3. Solution temperature should be 105° F.
4. Do not raise can more than eighteen inches above anus.
5. Have patient take deep breaths to help retain solution.

Equipment and Supplies

1. Enema kit
2. Lubricant
3. Solution

Performance Guide

1. Wash hands.
2. Assemble equipment.
3. Identify patient.
4. Prepare solution using water at 105°F or 40.5°C and other additives if specified.
5. Explain procedure.
6. Screen patient for privacy and protect bedding.
7. Set up equipment, positioning container 12-18 inches above the anus.
8. Position patient comfortably on left side with left leg straight and right leg flexed (Sims position).
9. Lubricate rectal tube and expel air.
10. Insert rectal tube, slowly and gently about 4 inches into rectum.
11. Instill solution slowly to prevent cramping and urge to expel solution.
12. Remove rectal tube and cover it with tissue.
13. Assist patient on to bedpan or help patient to bathroom; instruct patient to wait for 10 minutes before expelling solution or at least 30 minutes for retention enema.
14. Remove bedpan and check contents.
15. Provide for patient's comfort and cleanliness.
16. Wash hands.
17. Report observations and procedures.

PROCEDURE: Administer sitz bath.

Performance Objective

Given the necessary equipment and supplies, assist the patient with a sitz bath. (5)

Safety Factors

1. Water temperature must be prepared and maintained at 100-110 degrees F. (37.7°C - 43.3°C).
2. Avoid discomfort.
3. Bath must continue for the prescribed length of time.

Equipment and Supplies

1. Bath linens
2. Bath thermometer

Performance Guide

1. Check work order.
2. Identify patient and explain procedure.
3. Wash hands.
4. Assemble equipment.
5. Prepare water at 100°F - 110°F (37.7°C - 43.3°C)
6. Place double folded towel in bottom of tub, or prepare according to employer policy.
7. Assist patient into sitz bath, having patient sit.
8. Allow patient to stay in tub for designated time (20-30 minutes).

   NOTE: Keep water at constant temperature for prescribed length of time. Remain with patient to prevent danger of fainting while unattended.

9. Assist patient out of sitz bath onto dry towel. Be prepared to support patient should the heated bath cause dizziness.
10. Assist patient to dry and dress, as necessary, and escort to room.
11. Provide for patient's comfort.
12. Clean and store equipment.
13. Record procedure.

PROCEDURE: Apply ace bandage.

Performance Objective

Given the necessary equipment and supplies, apply the bandage to the designated area. (2)

Safety Factors

1. Check for adequate circulation.
2. Wrap with proper tension and overlap.

Equipment and Supplies

1. Ace bandage
2. Fastener

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. When wrapping an extremity, elevate it to level of heart.
5. Position patient comfortably.
6. Apply bandage spirally with firm, even pressure, anchoring at beginning and avoiding wrinkles. Wrap from distal to proximal part of extremity.
7. Make sure area is completely covered with bandage.
8. Anchor end of bandage.
9. Check pulse or observe skin color to see if circulation is adequate.
10. Report procedure.

PROCEDURE: Assist with transferring patient.

Performance Objective

Given the necessary equipment and supplies, assist with transferring the patient. The following criteria must be met:

1. The patient must be moved safely without undue discomfort or injury.
2. All the patient's belongings must be transferred.
3. The patient must be introduced to unit if appropriate. (2/3)

Safety Factors

1. Proper use of vehicle.
2. Good body mechanics

Equipment and Supplies

1. Proper vehicle for transporting.
2. Chart if transferred with patient.

Performance Guide

1. Wash hands and identify patient.
2. Discuss transfer procedure with patient.
3. Collect patient's belongings (clothes, equipment, personal items).
4. Obtain the proper vehicle for moving.
5. Move the patient, using good body mechanics and safety measures.
6. Assist patient into new bed, positioning for comfort and safety.
7. Acquaint patient with new surroundings and introduce to staff and other patients in new unit.
8. Return equipment used for moving patient.
9. Strip room for cleaning.
10. Remove soiled linen.
11. Report procedure.

PROCEDURE: Isolation Technique.

Performance Objective

Given the necessary equipment and supplies, don and remove gown, mask and gloves and do terminal cleaning using isolation techniques without contamination. (2/3)

Safety Factors

Make sure any open cuts or abrasions are covered adequately.

Equipment and Supplies

1. Gown
2. Mask
3. Gloves with wrapper
4. Germicidal solution
5. Basin
6. Bag

Performance Guide

1. Don gown, mask and gloves.
   a. Remove watch and rings.
   b. Wash hands.
   c. Remove mask from container; place over nose and mouth and tie securely, top strings first.
   d. Hold gown at neck and let unfold.
   e. Put arms through sleeves, one at a time, touching only inside of gown.
   f. Adjust gown.
   g. Tie neck tapes.
   h. Bring gown together and tie waist belt.
   i. Obtain glove wrapper; lay on flat surface and unfold.
   j. Remove powder and powder hands if appropriate.
   k. Remove one glove from holder by grasping folded edge and place on hand.
      (Repeat for second glove.)
   l. Adjust gloves on fingers; and after caring for the patient.
   m. Gather soiled items and place into bag.
   n. Tie the bag.
   o. Place sealed bag into clean bag which second person (clean person) is holding outside unit.
   p. Tie and label bag (clean person).
   q. Dispose of bag at appropriate place (clean person).

(continued on next page)

Performance Guide (continued)

2. Terminal Disinfection.
   a. Put all articles which can be autoclaved into one bag.
   b. Place bag in clean bag held by clean person outside room.
   c. Dispose of any disposable items.
   d. Wipe delicate instruments, gown standard and other items which cannot be autoclaved with germicidal solutions.
   e. Give instruments to clean person using double bagging technique.
   f. Label bag and send to central processing (clean person).
   g. Remove all burnable articles using double bagging technique.
   h. Label bag and send to incinerator (clean person).
   i. Remove all unused items in same manner as above (2,b,c,) separating those which are to be autoclaved from those which cannot be autoclaved.
   j. Place soiled linen in laundry bag.
   k. Notify housekeeping that terminal cleaning is needed.

3. Remove gown, mask, and gloves.
   a. Untie waist belt of gown and pull toward front.
   b. Wash hands.
   c. Untie neck ties.
   d. Remove mask by untying bottom strings first.
   e. Dispose of mask.
   f. Pull sleeves off one at a time without touching outside of gown.
   g. Remove gown and dispose of it properly.
   h. Remove one glove at a time. (Do not touch skin with dirty surface.)
   i. Dispose of gloves.
   j. Wash hands before and after leaving unit.

PROCEDURE: Assist with discharge.

Performance Objective

Given the necessary equipment and supplies, assist with the discharge procedure. The following criteria must be met:

1. All patient's belongings must be packed.
2. The patient must be transported safely without undue discomfort or injury. (2/3)

Safety Factors

1. Proper use of vehicle.
2. Good body mechanics.

Equipment and Supplies

1. Discharge form.
2. Proper vehicle for transporting.

Performance Guide

1. Wash hands and identify patient.
2. Explain discharge procedure with patient and family
3. Gather necessary equipment.
4. Obtain patient's belongings from safe, if necessary.
5. Pack patient's belongings, if necessary.
6. Assist patient in getting dressed, if necessary.
7. Transport patient to waiting vehicle, and remain with patient.
8. Check to see if agency business procedures have been completed.
9. Strip patient's room for cleaning.
10. Report departure.

PROCEDURE: Post-Mortum Care-Agency and Home.

Performance Objective

Given an expired patient, assist with post-mortum care. The body must be clean and neat, prepared and identified according to agency policy. (2/4)

Equipment and Supplies

Death Care Kit

Performance Guide

1. Agency.
   a. Wash hands.
   b. Place body in supine position, closing eyes (by gently pulling on eyelashes) and mouth (check hospital policy regarding dentures).
   c. Remove all valuables unless family desires otherwise (if a ring is to be left on finger, secure it with adhesive tape). Check agency policy.
   d. Clean patient's body. Check agency policy.
   e. Comb patient's hair.
   f. Change dressing, if necessary.
   g. Pack rectum, vagina and colostomy, if present, with designated material according to agency policy.
   h. Disconnect and remove any devices, such as tubes, or catheters.
   i. Dress body according to agency procedure.
   j. Identify body accordingly by placing tag on body and on shroud.
   k. Remove body according to agency procedure.
   l. Care for all valuables removed and any other personal property of patient according to agency policy.
   m. Report procedure and take body to designated area.

2. Home
   a. Wash hands.
   b. Place body in supine position, closing eyes (by gently pulling on eyelashes) and mouth. Remove dentures if still in place.
   c. Remove all valuables unless family desires otherwise. If ring is to be left on finger, secure with adhesive tape.
   d. Bath patient's body.
   e. Comb patient's hair.
   f. Change dressings, if necessary.
   g. Disconnect and remove any devices, such as tubes or catheters.
   h. Cover with sheet.

PROCEDURE: Initiate and route incident or accident reports.

Performance Objective

Given access to the forms and information needed concerning an accident and an incident in which nursing assistant was involved, prepare and route the accident and incident forms without error as to time, place and identify according to agency policy. (9)

Safety Factors

It is important to report any incident in which you are involved or that you observed for the protection of all persons involved.

Equipment and Supplies

Accident and incident forms.

Performance Guide

1. Notify supervisor of incident or accident.
2. Secure the incident/accident form which, when completed, becomes a legal document.
3. Place names, date, time, and place on the form in the proper location.
4. Write a brief account of what happened. Caution: Strict adherance to accurate fact is vitally important since this report constitutes a part of a possible litigation process.
5. Put form in designated place for the proper person to complete.
6. Have form signed by physician when completely filled out.
7. Send the completed report form to the nursing office.

SECTION II - HOME HEALTH ASSISTANT

Home health assistants are individuals prepared to give personal care to convalescent, disabled or chronically ill persons of all ages in the home. Personal care duties which may be performed are essentially those which would be performed by a nursing assistant in an institution and/or those which could be performed by a knowledgeable family member.

The following procedures are relevant to the home health assistant phase of the Health Assistant Curriculum. Please note that many of the procedures listed under Section I - Nursing Assistant are relevant also to the Home Health Assistant.

PROCEDURE: Baby holds.

Performance Objective

Given a baby, demonstrate the following: lifting, cradle hold, shoulder hold, and football hold. (28)

Performance Guide

1. Lifting
   a. Slide one hand under the head and neck. Grasp the baby's outer arm.
   b. Support the baby's head with the forearm.
   c. Slide the other hand under the baby's legs and grasp thigh of baby's outer leg.
   d. Gently lift the baby.

2. Cradle Hold
   a. Cradle infant's head in the bend of your elbow.
   b. Extend your forearm around outside of infant's body.
   c. With fingers of same hand, grasp the infant's outer leg.
   d. Place your other hand on infant's buttocks for additional support.

3. Shoulder Hold
   a. Place infant in an upright position with his/her legs and arms against your chest.
   b. Rest the infant's head against your shoulder.
   c. Support the infant's back with your forearm and the head with your hand.
   d. Support baby's buttocks with palm of your other hand.

4. Football Hold
   a. Place baby's buttocks firmly between your hip and elbow.
   b. Support baby's back with your forearm.
   c. Support baby's neck and head with your open hand.

THE POSTPARTAL PERIOD

A. Lifting

B. Cradle hold

C. Shoulder hold

D. Football hold

PROCEDURE: Bathing the baby.

Performance Objective

Given the necessary equipment and supplies, bathe the baby. (28)

Safety Factors

1. Make sure infant is held securely at all times.
2. Never turn away or leave baby.
3. Room should be free from drafts.
4. Water temperature, 95-100 degrees
5. Work at comfortable height.
6. Report any unusual observations.

Equipment and Supplies

1. Plastic tub or basin
2. Soft thick towels
3. Baby soap
4. Soft wash cloths
5. Oil or talcum powder
6. Baby clothes

Performance Guide

1. Wash hands.
2. Fill basin 1/3 full with warm water, 95-100 degrees.
3. Wash baby's face, eyes, ears, nostrils with water.
   a. eyes - inner canthus to outer canthus.
   b. face - do not cover nose and mouth at the same time.
   c. ears - wash behind the ear and the outer ear.
   d. dry by patting with towel.
4. Undress the baby on a towel and cover with another towel.
5. Wash neck, arms, axillae and abdomen with soap and water giving special attention to fold of the skin.
6. Rinse and pat dry.
7. Wash lower extremities paying particular attention to folds of the thighs.
8. Rinse and pat dry.
9. Turn baby on abdomen with head turned to the side.
10. Wash back and buttocks.
11. Rinse and pat dry.
12. Turn on back.
13. Wash genital areas.
    a. female - front to back between labia.
    b. male - retract foreskin, cleanse and replace foreskin.

Performance Guide (continued)

14. Rinse and pat dry.
15. If talcum or oil is used, apply first to hands and then to baby.
16. Dress baby.

If tub bath is used, follow 1-4 in the above procedure: then,

5. Lift baby into tub, feet first.
6. Using arm and leg hold on baby, with one arm and hand, use the other hand to soap arms, neck, chest, abdomen. Rinse well.
7. Wash lower extremities and rinse.
8. Wash back and buttocks and rinse.
9. Using both hands and the lift method, lift baby out of the tub onto a towel.
10. Quickly pat dry.
11. Dress baby.

PROCEDURE: Feeding a baby.

Performance Objective

Given an assignment sheet and infant, feed the baby. (5/6)

Safety Factors

1. The baby must be held securely.
2. The prescribed formula at the proper temperature and in correct amount must be fed to the baby.
3. Following feeding, the baby must be positioned in crib to prevent aspiration after feeding.
4. Bottles must never be propped due to danger of aspiration. Infant should be in a semi-upright position.

Equipment and Supplies

1. Formula
2. Bottle

Performance Guide

1. Wash hands.
2. Identify baby.
3. Select proper formula and amount.
4. Check size of nipple holes.
5. Select temperature of formula.
6. Test temperature of the formula. (slightly warm to inside of wrist.)
7. Sit comfortably, holding baby to feed, supporting head and neck.
8. Hold bottle at approximately 45 degree angle.
9. Feed baby until sucking ceases and formula trickles from mouth. (1-2 oz.)
10. Remove bottle from infant's mouth.
11. Place diaper on your shoulder.
12. Lift infant to upright position and support against your upper chest. Support head, neck, and back.
13. Burp infant by patting or rubbing back.
14. Continue to alternate feeding and burping until formula is consumed or infant is satisfied.
15. Place infant in bed (on side or abdomen).
16. Raise crib sides.
17. Record amount and time of feeding.

PROCEDURE: Assist patient to bathroom.

Performance Objective

Given a patient in need, assist him/her to a bathroom or to bedside commode. (6)

Safety Factors

1. Avoid injury.
2. Provide privacy.

Equipment and Supplies

1. Robe
2. Slippers
3. Footstool

Performance Guide

1. Wash hands.
2. Identify patient.
3. Assist patient to sitting position on side of bed. If patient is dizzy, allow him/her to sit for a few minutes before standing.
4. Assist patient with robe and slippers.
5. Help patient to stand.

   NOTE: Have patient place feet firmly on the floor or footstool and place hands on the mattress to help push up. Place hand under proximal axilla and assist to a standing position. Stand at patient's side and hold arm or shoulder for support as patient stands and balances before stepping down from the footstool or beginning to walk.

6. Assist patient to walk to bathroom or bedside commode providing support as necessary.
7. Arrange clothing so patient can sit on commode.
8. Place toilet tissue in easy reach and leave patient in privacy if condition permits. (Stay within distance or provide call system).
9. Assist patient with perineal cleansing, if necessary.
10. Provide for patient to wash hands.
11. Help patient back to bed, reverse procedure, and make him/her comfortable.

PROCEDURE: Assist with removing or remove fecal impaction.

Performance Objective

Given the necessary equipment and supplies, remove the fecal impaction. (6/27)

Safety Factors

1. Provide privacy and comfort.
2. Lower colon must be free of fecal material that can be reached with index finger.

Equipment and Supplies

1. Bedpan and cover
2. Gloves
3. Toilet tissue
4. Lubricant
5. Chuxpad

Performance Guide

1. Gather supplies and equipment.
2. Wash hands.
3. Identify patient.
4. Instruct patient regarding the procedure.
5. Screen patient for privacy.
6. Position patient in left Sims position.
7. Put on gloves and lubricant.
8. Examine patient for fecal impaction.
9. Break up and remove fecal impaction.
10. Remove remaining fecal material.
11. Provide for patient's comfort.
12. Observe fecal material and dispose of according to instructions.
13. Clean, store, or dispose of supplies.
14. Wash hands.
15. Report and/or record procedure.

PROCEDURE: Assist in putting on or removing braces of a patient.

Performance Objective

Given a back, long leg, short leg, and neck brace, apply and remove each of the four different types of braces. (6)

Safety Factors

1. Check circulation.
2. Check pressure points.

Equipment and Supplies

1. Various braces

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Position patient for brace application.
5. Apply brace.
6. Check for pressure areas.
7. Report pain or discomfort.
8. Remove brace and store appropriately.
9. Check for reddened areas.
10. Leave patient comfortable.

NOTE: A resource person may be called in to demonstrate various brace applications.

SECTION III - MEDICAL AND DENTAL OFFICE PROCEDURES

Although these procedures could have been included with the sections listed Medical Assistant and Dental Assistant, separation of these procedures provides freedom for the instructors to utilize them as they best apply to their teaching plan.

The following procedures are relevant to the medical and dental office phase of the Health Assistant Curriculum.

PROCEDURE: Maintain office environment

Performance Objective

Given an equipped dental office and guidelines, check all factors and make the adjustments as needed. All items on the instructor's checklist must be acceptably completed. (1)

Guidelines for Office Environment

1. Humidity control - 30-50 percent.
2. Temperature - 68-72 degrees.
3. Lighting - soft and diffused in waiting rooms; bright but not glaring in treatment rooms and work areas.
4. Keep noise at a minimum.
5. Control odors.
6. Maintain a neat and orderly office appearance.
7. Provide for ventilation.
8. Check safety factors and make corrections - wet spots on floor, defective electrical equipment and cords, objects which might be cause of falls, etc.

Performance Guide

1. Check thermostat for proper temperature.
2. Adjust lights as needed.
3. Demonstrate care in handling articles to prevent dropping on floor.
4. Dispose of refuse in appropriate manner.
5. Straighten waiting room. Arrange magazines in a neat and orderly manner.
6. Check for safety hazards:
   a. Wipe up spills and wet spots immediately.
   b. Check electric cords, outlets, and equipment. Remove defective items.
   c. Remove obstacles out of way.

INSTRUCTOR CHECKLIST: Maintain office environment

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Checked thermostat for proper temperature		
2. Adjusted lights as needed		
3. Used care in handling articles to prevent dropping on floor		
4. Disposed of refuse in appropriate manner		
5. Straightened waiting room. Arranged magazines in a neat orderly manner		
6. Checked for safety hazards: a. Wiped up spills and wet spots immediately		
b. Checked electric cords, outlets, and equipment. Removed defective items c. Removed obstacles out of way		

*All steps must be rated acceptable.

PROCEDURE: Place telephone call

Performance Objective

Given a telephone and two calls to be placed, place the call according to established procedure. (1)

Problem

Your instructor will provide you with a telephone. Demonstrate how you would place the following calls.

1. You have been asked to call the travel agency and make arrangements for the dentist to travel to San Francisco, leaving your town on Monday evening and returning on Friday.
   a. Ascertain the date of the trip, time of departure and return, the mode of transportation, the number in the party, and type of lodgings preferred and costs.
   b. Arrange for and confirm the necessary transportation and hotel reservations and delivery of tickets.
   c. Record all the necessary information (airlines, flight numbers, etc.) and give one copy to the doctor; keep one copy in case the doctor must be reached.
2. You have noticed that Mrs. Carey is due in for a recall appointment. Make the call and schedule her for an appointment.

Performance Guide

1. Look up telephone number. Make sure it is correct.
2. Position mouthpiece properly.
3. Dial number.
4. When party answers introduce self and give the name of the dentist.
5. Be prepared to take notes.
6. Give caller your message. Answer questions as needed.
7. Keep calls brief, concise and to the point.
8. When call is completed, replace the reciever gently.

INSTRUCTOR CHECKLIST: Place telephone calls

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Looked up telephone number. Made sure it was correct		
2. Positioned mouthpiece properly		
3. Dialed number		
4. When party answered introduced self and gave the name of the dentist.		
5. Was prepared to take notes		
6. Gave caller your message. Answered questions as needed		
7. Kept calls brief, concise and to the point		
8. When call was completed, replaced the receiver gently		

*All steps must be rated acceptable.

PROCEDURE: Receive telephone calls

Performance Objective

Given a telephone and two incoming telephone calls, take the calls and demonstrate an acceptable manner for handling them. Use the proper procedure as established for each situation. (1)

Problem

Arrange with your instructor to provide you with the following calls:

1. Mrs. Jones is calling to cancel her appointment and wants to be reappointed in two weeks.
2. Mrs. Kennedy is calling. She is upset about her account and wants to speak to the physician immediately. At the time of the call the physician is with a patient.

Performance Guide

1. Identify proper use of the telephone.
2. When answering the telephone, project voice with a smile.
3. Use good telephone manner.
   a. Be courteous, sincere and pleasant
   b. Speak distinctly into the mouthpiece which has been placed one inch from the mouth.
   c. Use good speech habits.
4. Identify office and self.
5. Provide the caller the necessary assistance.
6. If necessary, refer caller to dentist or take caller's telephone number and assure him/her that the dentist will return the call.
7. Close call in a gracious manner, letting the caller hang up first.
8. Keep all office information confidential.
9. Write messages for office personnel.

PROCEDURE: Maintain appointment book

Performance Objective

Given the appointment book, schedule all appointments requested for one day. Upon completion, the book must show names of patients, including notation of new patients and their telephone numbers; buffer time must be provided in the daily schedule; and the estimated time needed for each patient must be marked off. (1/10)

Performance Guide

1. Determine the days and hours the physician is scheduled to be in the office.
2. Determine office policy for scheduling complete physical examination, new patients follow-up patients.
3. Allow time for lunch, emergencies, etc.
4. Block off the amount of time needed for each patient.
5. Identify the patient's problem, if this is standard office procedure.
6. Estimate length of time necessary for each patient.
7. Indicate if patient is a new patient by adding the initials, N.P.
8. Obtain new patient's address and phone number.
9. Give patient the choice of times to see the doctor.
10. If rescheduling, give patient an appointment card.

PROCEDURE: Maintain appointment control

Performance Objective

Given an appointment book and a list of patients to be appointed, schedule the appointments for each patient allowing sufficient time for each treatment, emergencies and lunch hour. Upon inspection by in instructor, the appointment book must show adequate time for each patient and a variety in the day's treatments. (12)

Performance Guide

1. Mark off days office is closed and holidays.
2. Write in meetings and other activities dentist participates in on the proper day and time.
3. Schedules patients by:
   a. identifying type of work to be done and the length of time needed.
   b. give patient a choice of two open times.
   c. allow buffer time (lunch, emergencies, etc.).
   d. indicate when patient is being scheduled for first appointment.
   e. mark off the unit of time needed for the treatment.
   f. vary the types of treatments for each day.
   g. schedule children according to age and physical ability.

PROCEDURE: Maintain an active recall system

Performance Objective

Given a list of patients who are to return at intervals of three months, six months, and one year, file a reminder to recall the patient when appointment is due according to the procedure established by the dentist. (12)

Performance Guide

1. Identify purpose for maintaining a recall system.
2. Identify groups of patients for recall:
   a. individuals whose time is limited
   b. individuals who need prophylaxis treatments
3. Enter name of patient and his telephone number on recall file card.
4. List treatment to be performed.
5. File card under month recall is due.
6. Check recall file the first of each month.
7. When recall appointment is due, mail reminder card or telephone patient and schedule appointment.
8. If patient is one whose time is limited; call patient when an appointment is cancelled.

PROCEDURE: Maintain an appointment reminder system

Performance Objective

Given an appointment book and a telephone, contact the patients who are to be seen the next day and confirm their appointment as scheduled in the appointment book. Each patient must be called or a note made to recall those who were not located.

Performance Guide

1. Open appointment book to next day's appointments.
2. Find each patient's phone number if not noted in appointment book.
3. Call and remind each patient of appointment.
4. Reschedule patient if appointment cannot be kept.
5. Place a check (✓) beside the names of those patients reached and make a note as a reminder to call those you could not reach.

PROCEDURE: Schedule patient appointments

Performance Objectives

Given an appointment book and scheduling responsibilities, schedule the patient appointments. Patients must be scheduled according to the urgency of the appointment and the anticipated treatment times; patient's names and telephone numbers must be entered in the appointment book in the day and time slot agreed upon; transactions must be verified by the instructor's controlled scheduling. (1)

Performance Guide

1. Schedule new appointments
   a. Obtain patient's name, address, and telephone number.
   b. Ascertain the reason for the appointment.
   c. Determine the urgency of the appointment.
   d. Ascertain the preferred date and time.
   e. Offer the available appointment times based on:
      (1) Urgency of appointment
      (2) Time blocks available for anticipated treatment time required.
   f. Enter mutually agreeable time in appointment book.
   g. Give patient an appointment card or have patient verify that he/she understands the time and date.
2. Reschedule patient appointment
   a. Cancel the patient's original appointment.
   b. Explain the reason for cancelling (if the doctor is initiating the change).
   c. Ascertain the date and time the patient prefers for rescheduling.
   d. Determine a mutually agreeable date and time.
   e. Enter new appointment time in the book.
   f. Give patient an appointment card or have patient verify that he/she understands time and date.
   g. Draw one line through cancelled appointment. DO NOT ERASE

PROCEDURE: Receive patients and visitors (Doctor's Office)

Performance Objective

Given patients and visitors in the doctor's office, receive them according to established office procedure. All items on the instructor's checklist must be completed acceptably. (1/10)

Performance Guide

1. Observe when each patient or visitor arrives.
2. Acknowledge the person in a pleasant manner.
3. Ascertain the person's name and purpose of visit.
   a. Ask patient to sign in (if procedure is used).
   b. Ask patient if there has been a change of address or insurance coverage.
   c. If visitor is a salesmen, determine when the doctor's schedule will permit him to see the salesmen if he so desires.
4. Address person by name.
5. Show person where to put hat, coat, or parcels.
6. Invite person to be seated and offer reading material.
7. Inform the person as to length of wait before seeing physician.

INSTRUCTOR CHECKLIST: Receive patients and visitors

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Acknowledged each person in a pleasant manner		
2. Ascertained each person's name and purpose of visit		
3. Asked patients to sign in		
4. Determined if patient had new address, telephone number or insurance number		
5. Invited each person to be seated		
6. Informed each unscheduled visitor if and when the doctor would be able to see him		

*All steps must be rated acceptable

PROCEDURE: Receive patients and visitors (Dentist Office)

Performance Objective

Given a fully equipped dental office reception area, and patients and visitors arriving in the office, receive them observing the principles for maintaining good public relations. (1)

Problem

In the skills laboratory demonstrate how you would receive the following people:

1. Bobby Kent, accompanied by his mother, is reporting for a 10:00 a.m. appointment. The dentist will be delayed and Bobby will need to wait before being seen.
2. Mrs. Kenny enters the office and wants an appointment as soon as possible.
3. Mr. King enters the office. The right side of his face is swollen, and he wants to see the dentist immediately.
4. Mr. Martin, salesman for a dental supply company enters the office and wants to see the dentist about buying a new product his company is introducing on the market.
5. Dr. Wilson, D.D.S. arrives in the office for a consultation session followed by lunch with your dentist.

Performance Guide

1. Give cordial treatment to all persons who enter the office.
2. Receiving patients:
   a. Greet patients by name.
   b. Project the attitude that each patient is a VIP.
   c. If dentist will be late, inform the patient of the delay and approximate length of time.
   d. If patient is unexpected, determine if he is having pain.
3. Receiving salesmen:
   a. Determine purpose for visit in a courteous manner.
   b. Determine if dentist wishes to see the retailman.
   c. If dentist is busy, make appointment for salesman to see him.
4. Professional colleague:
   a. Greet in a courteous manner.
   b. Invite professional person to be seated.
   c. Inform dentist colleague is in the reception room.

PROCEDURE: Complete registration form for a new patient

Performance Objective

Given a new patient and a registration form, complete the form. Upon completion, all the required information must be filled in on the form without error.

Performance Guide

1. Determine if patient is new.
2. Obtain and record the necessary information:
   a. Name, age, marital status
   b. Home address, telephone number
   c. Occupation, business address, phone number
   d. Referring physician if any
   e. Person to whom bill is to be sent and address
   f. Method of paying bill
   g. Health insurance
      (1) name of carrier
      (2) group policy number
      (3) type of coverage
      (4) patient's policy number
      (5) others

PROCEDURE: Take and record patient's medical and dental history

Performance Objective

Given a new patient and a medical/dental history form, instruct the patient in completing the information. All necessary information must be recorded on the form. (12)

Performance Guide

1. Identify purpose for obtaining a record of the patient's medical and dental history.
2. Assess patient's ability to complete form by self.
   a. children
   b. handicapped person
   c. elderly
3. If patient is able to complete form, give form to patient. Provide pen and give instructions for completing the form. Answer all questions the patient may ask.
4. If patient is unable to complete form, ask the patient the questions and write the answers as given in the appropriate space provided on the form.
5. Check form for completeness based on patient's or parent's response:
   a. patient's full name and address and telephone number.
   b. name of person responsible for payment of the account.
   c. name of patient's personal physician
   d. age and sex
   e. medical history of the following:
      (1) allergies and causes
      (2) drugs--maintenance
      (3) chronic conditions
      (4) pregnancy
   f. dental history
6. File completed form with patient's record for dentist's review.

PROCEDURE: Prepare medical file for a new patient

Performance Objective

Given a new patient and the necessary supplies, prepare a medical file for the patient. File must have route slip attached and include get-acquainted form, index card on patient, financial card and referring doctor's name. (1/10)

Performance Guide

1. Ascertain that the person is a new patient.
2. Give the new patient a preprinted get-acquainted form to complete.
3. Check the form for completeness and legibility.
4. Prepare the standard office form for the patient:
   a. name
   b. date of birth
   c. home address and phone number
   d. office address and phone number
5. Note the name of the doctor by whom the patient has been referred on the patient's record.
6. Prepare a file folder on the new patient according to established procedure.
7. Place the necessary forms in the folder.
   a. history
   b. physical examination
   c. others
8. Clip a route slip on the outside of the patient's record.
9. Prepare patient financial ledger card.

PROCEDURE: Explain doctor's fees

Performance Objective

Given a fee schedule and a patient with a bill for services rendered, explain the fee charge to a patient. Information given to the patient must be without error and given in a courteous manner. (1/10)

Performance Guide

1. Ascertain that the patient has correct bill.
2. Refer to the fixed schedule of fees for the various services rendered.
3. If possible, explain medical charge in advance.
4. Explain itemized billing:
   a. patient's name
   b. date
   c. type of service rendered
   d. fee
5. Display professional attitude toward patient:
   a. Be knowledgeable of fee schedule.
   b. Answer questions politely and with patience.
6. Refer the patient to the doctor if fee explanation is unsatisfactory to the patient.

PROCEDURE: Collect fees for medical or dental services

Performance Objective

Given a delinquent account and methods for collecting unpaid accounts, collect the balance due on the unpaid accounts. All transactions must be made according to established office procedure. (1)

Performance Guide

1. Identify procedure for collection follow-up.
   a. a series of reminder notices or statements
   b. a letter to the patient
   c. a telephone call
2. Type (2) sample letters which could be used to encourage patients to make payments on overdue accounts. Submit to instructor.
3. When patient responds to telephone call or letter:
   a. Determine reason patient can't pay.
   b. If reason is valid, make arrangements the patient can meet.
4. If patient does not respond give account to reputable collection agency. Include;
   a. complete name and address
   b. amounts owed
   c. dates on all transactions

PROCEDURE: Issue receipts

Performance Objective

Given a receipt book, carbon paper, and the amount being paid, write a receipt. When completed, the receipt must contain the correct information. (1)

Problem

Your instructor will provide you with a receipt book. Issue a receipt to the following patient:

Mr. J. B. Smith is paying $50.00 on his account following treatment of a dental condition. After giving his check for this amount he will still owe $150.00.

Performance Guide

1. Prepare receipt receipt book.
2. Check patient's financial record for amount owed. (If person is a new patient this is not necessary.)
3. Write the day, date of month, and year on the receipt using a ball point pen.
4. Write the patient's full name on the receipt.
5. If parent or guardian is paying, write the name of the patient for whom the dental fees are being paid.
6. Write the amount that is paid in the space provided.
7. Write the amount still owed, or if the account is paid in full.
8. Give original copy of receipt to the patient.

PROCEDURE: Reconcile cash accounts and receipts

Performance Objective

Given copies of the day's receipts, reconcile them with the total amount of cash and checks recieved. Upon completion, the amounts of both should be equal.

Performance Guide

1. Total cash and checks received.
2. Total amount of receipts.
3. Compare the two totals.
4. If totals are not the same, repeat the process until correct or until the cause for any discrepancy has been determined.

PROCEDURE: Complete daily record sheet

Performance Objective

Given a daily record sheet and the necessary equipment and supplies, complete the daily record sheet for one day. All charges, cash, and accounts must be itemized and totaled without error and a notation made in the proper space as to the type of service rendered for each patient. (13)

Performance Guide

1. Note hours of appointment.
2. Note name of patients.
3. Note service rendered - usually posted after the examination, etc.
4. Note charge.
5. Note whether cash/check is received.
6. Note payment received on account.
7. Total all columns.

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Complete daily record sheet

DAILY RECORD OF CHARGES AND CASH RECEIPTS

DATE	EXPLANATION	1 CHARGES AND CREDIT ADJUSTMENT CR ADJ SHOULD BE CIRCLED AND SUB WHEN TOTALING	2 CASH RECEIPTS	3 BALANCE CIRCLE CR BAL AND SUBTRACT WHEN TOTALING	4 PREVIOUS BALANCE	NAME OF ACCOUNT	RECEIPT NUMBER
	AMOUNTS FORWARDED						
	TOTAL THIS DAY ——→						

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PROCEDURE: Prepare bank deposit slips

Performance Objective

Given a bank deposit slip and the day's collection of fees, prepare a deposit slip in duplicate. When completed, all checks must be endorsed and listed on the deposit slip, and coins, currency, and checks totaled without error. (10)

Performance Guide

1. List the name of the depositor and, if necessary, the account number on the deposit slip.
2. Assemble all checks:
   a. Count number of checks.
   b. Endorse checks.
   c. Record the amount of each check on the deposit slip.
3. Count paper currency and note amount.
4. Count coins and note amount.
5. Add total amount of currency.
6. Record amount of currency on bank deposit slip.
7. Total amount of checks and currency and record on deposit slip.
8. Place checks, currency and deposit slip into container for transportation to bank.
9. Keep one copy of deposit slip for office records.

Prepare bank deposit slips

DATE _____ 19 _____

Name _____

Address _____

_____

CHECKS AND OTHER ITEMS ARE RECEIVED FOR DEPOSIT SUBJECT TO THE TERMS AND CONDITIONS OF THIS BANK'S COLLECTION AGREEMENT.

B and O STATE BANK
Office, Kentucky 00700

Specimen

Account No. _____

Deposit Slip

CASH			
CHECKS ENDORSE AND LIST EACH ITEM			
LESS CASH			
TOTAL			

CHECKS	DOLLARS	CENTS
1		
2		
3		
4		
5		
6		
7		
8		
9		
10		
11		
12		
13		
14		
15		
16		
17		
18		

ENTER THE TOTAL ON THE FRONT OF THIS TICKET

PROCEDURE: Maintain petty cash fund

Performance Objective

Given a petty cash fund, vouchers, an expense book, and blank checks, maintain the petty cash fund for one week. At the end of the week, all transactions must be recorded in the expense book, and the expense book must be balanced. (10)

Performance Guide

1. Record the beginning balance.
2. Prepare petty cash voucher for each amount withdrawn.
3. Record vouchers in expense book.
4. Write checks to replenish fund as necessary.
5. Record cash added.
6. Balance expense book at the end of time period.

Maintain petty cash fund

PETTY CASH VOUCHER

DATE _____ 19 _____ NO. _____

TO _____ AMOUNT

FOR _____

CHARGE TO _____

RECEIVED BY _____ APPROVED BY _____

PROCEDURE: Maintain separate patient financial and treatment records

Performance Objective

Given separate patient financial and treatment records, and information to be entered, enter a written account of the services rendered, dental fees, and amounts paid so that each record contains all of the required information. (12)

Problem

In the skills laboratory you will find separate patient financial and treatment records. Record the following information:

Patient: James C. Stilwell
Address: 225 E. 5th Street
Home phone number: 735-2448 Office phone number: 365-9000
Occupation: Lawyer
Party responsible for account: Self
Prophylactic treatment
Full mouth x-rays
Dental fees: $50.00
Amount paid: $50.00

Performance Guide

1. Determine doctors methods for keeping records.
2. Receive information.
3. Pull patient's treatment record:
   a. Record type of treatment
   b. Record doctor's fees.
4. Pull patient's ledger card:
   a. Record type of treatment.
   b. Record doctor's fees.
   c. Record payment (if made).
   d. Balance amount owed (if necessary).
5. Return forms to appropriate file.

PROCEDURE: Process charge slips

Performance Objective

Given charge slips, patient files for the day's appointments, and other necessary supplies, process the charge slips. At the end of the day each patient seen must have a charge slip indicating patient's name and address, the date, services rendered, charges incurred, and amount paid. These must be verified by patient charts. (10)

Performance Guide

1. Fill out a charge slip for each patient entering the patient's name and address and the date.
2. Clip the charge slip to the patient's medical history file, or hand the slip to the patient instructing her/him to give to the doctor.
3. Note: Be sure to verify that the patient and the medical history file are the same.
4. Verify the services which the doctor indicated on the charge slip with the services indicated on the patient's chart.
5. Record the amount due if the doctor did not do this.
6. Record the amount received on the charge slip.

Process charge slips (Route slips)

PLEASE LEAVE WITH RECEPTIONIST

DATE_____

PATIENT'S NAME_____

ADDRESS_____

SERVICES RENDERED	FEE	
CONSULTATION		
X RAY		
INJECTION		
SURGERY		
DIATHERMY		
LABORATORY		
DRUGS		
TOTAL		

NEXT APPOINTMENT_____

PROCEDURE: Assemble patient records for treatment

Performance Objective

Given an appointment book, patient dental record files, and other necessary materials, assemble the records of patient's who are scheduled for treatment. All items on the instructor's check-list must be acceptably completed. (1)

Performance Guide

1. Identify names of patients appointed on a specific day.
2. Pull dental records of patients returning for treatment on day appointed.
3. Assemble forms and prepare folder for new patients scheduled for treatment.
4. Prepare each record for dentist's review.
   a. secure mounted radiographs from file
   b. secure photographs (film slides) if these have been taken
   c. prepare charge forms and attach to each record
   d. secure study models
5. Review each record for completeness.
6. Arrange records according to hour of appointment.
7. When patient arrives, place record in operatory.

INSTRUCTOR CHECKLIST: Assemble patient records for treatment

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Identified names of patients appointed on a specific day		
2. Pulled dental records of patients returning for treatment on day appointed		
3. Assembled forms and prepared folder for new patients returning for treatment on day appointed		
4. Prepare each record for dentist's review		
a. secured mounted radiographs from file		
b. secured photographs (file slides) if these have been taken		
c. prepared charge forms and attached to each record		
d. secured study models		
5. Reviewed each record for completeness		
6. Arranged records according to hour of appointment		
7. When patient arrived, placed record in operatory		

*All steps must be rated acceptable.

PROCEDURE: Gather data for necessary reports regarding referrals to other doctors

Performance Objective

Given instructions from the doctor and the necessary supplies and information, gather data on a patient for a referral. The data must contain the name, address, phone number, previous medical history, conditions for which referral is made and an up-to-date description of the treatment thus far. Type referral letter. (1/10)

Performance Guide

1. Collect personal information on patient such as name, address and phone number.
2. Copy patient's previous medical history.
3. Note treatment rendered to date and condition for which referral is to be made.
4. Type referral letter.
5. Place with information for doctor's approval and signature.

PROCEDURE: Make referral appointment for patients

Performance Objective

Given a patient and the necessary information, make a referral appointment for the patient. The appointment must be made with the specified doctor; the date and time must be agreeable to both the patient and the referred doctor; and the patient must be informed of the date, time and location of the appointment. (1/10)

Performance Guide

1. Determine doctor to whom patient is to be referred.
2. Ascertain whether the patient wishes an appointment made and the date and time preferred.
3. Contact the referred physician's office and make the appointment.
4. Advise the patient of the dates and times available and schedule the chosen time.
5. Give the patient a card with name of physician, date, and time of appointment, and the physician's office address.

PROCEDURE: Arrange for patient's admission to hospital

Performance Objective

Given orders from the doctor, arrange for a patient's admission to a hospital. All information required by the hospital should be supplied, and the patient should be informed of the name of the hospital, the date, and the time of admission. (1/12)

Performance Guide

1. Ascertain the type of admission:
   a. emergency
   b. routine
      1) medical
      2) surgical
      3) other
2. Obtain required information about the patient and record on form supplied by hospital.
   a. medical history
   b. admitting diagnosis
3. Call the hospital and give the hospital all necessary information pertaining to the patient.
4. Inform patient about admission time and policies of hospital.

PROCEDURE: Schedule patient for out-patient diagnostic tests

Performance Objective

Given a patient, the necessary information and supplies, schedule the patient for a diagnostic test as indicated by the doctor. The patient must be scheduled for the correct diagnostic test in the facility preferred by the doctor. (11)

Performance Guide

1. Determine name of patient, type of test to be performed, and facility to be used.
2. Determine time preferred by patient.
3. Call facility.
4. Schedule test(s)
5. Give patient an appointment slip:
   a. name of facility
   b. address
   c. phone number
   d. place to report for test
6. Give patient written instructions concerning preparation for tests:
   a. eating
   b. drinking water
   c. taking medicine
   d. enemas

PROCEDURE: Prepare outside agency file

Performance Objective

Given a local telephone directory, compile a file for the following types of agencies in your area. (1)

a. medical supply house
b. dentists
c. clinics
d. government agencies
e. special food stores
g. nursing homes
h. laboratories
i. pharmacies
j. social workers
k. surgical supplies
l. welfare agencies
m. others
n. poison control center
o. hospitals
p. funeral homes

Performance Guide

1. Obtain a list of agencies, their addresses and phone numbers.
2. Type an original with one carbon copy.
3. Submit original to instructor.

PROCEDURE: Prepare statements for mailing

Performance Objective

Given patient's ledger cards, statement sheets and envelopes, prepare the statement for mailing. Each statement must have name of patient, name and address of person responsible for charges, services rendered and amount due without error; address on envelope must be consistent with that on the statement. (1)

Performance Guide

1. Prepare statements including:
   a. date statement is prepared
   b. name and address of person responsible for charges
   c. itemized statement of dates, services were rendered, and persons for whom services were rendered for the billing period.
   d. other unpaid charges carried over (may or may not be itemized depending on office procedures)
   e. date payment is due
2. Prepare envelope with:
   a. full name of person responsible
   b. address including zip code

PROCEDURE: Type correspondence from rough draft

Performance Objective

Given a rough draft of a letter, a typewriter, and the necessary supplies, type the letter. The letter must be typed with one carbon copy, must conform to the rules of the specified style, contain no spelling errors, and be free from smudges.

Performance Guide

1. Read rough draft.
2. Make corrections in rough draft as needed.
3. Insert paper pack into typewriter.
4. Make typewriter adjustments according to specified style and length of letter.
5. Type correspondence.
6. Proofread copy before removing letter from typewriter.
7. Correct errors.

PROCEDURE: Prepare correspondence

Performance Objective

Given a typewriter, stationary, carbon paper, a rough draft of a letter, and all other necessary supplies, type the correspondence. When completed, the letter shcuild be in good business form, neat, and without errors in spelling. (1)

Problem

Your instructor will provide you with a typewriter, stationary, carbon paper, and a tape or rough draft of a dictated letter. Type the correspondence.

Performance Guide

1. Read rough draft.
2. Make corrections as needed.
3. Type letter.
4. Proofread copy.
5. Correct errors.
6. Prepare envelope.
7. Give letter to doctor for signature.
8. Prepare to mail.
9. File carbon copy.

PROCEDURE: Prepare purchase requisitions

Performance Objectives

Given a list of supplies, quantities to be ordered and a purchase form, prepare a purchase requisition. Upon completion, the order must meet the following standards: (10)

a. The item must match the description.
b. The quantity desired must be correctly indicated.
c. The cost of each item must be correctly listed.
d. The order must be totaled without error.
e. The method of shipping must be the most efficient and economical for the order.

Performance Guide

1. Determine company doctor prefers.
2. Check supply catalog:
   a. description of items
   b. cost
   c. quantity
3. Prepare purchase order in duplicate:
   a. date and address
   b. name of each item and description
   c. quantity desired
   d. cost of item
   e. total amount of order
   f. type of shipping
4. Review purchase order with physician or dentist before ordering.

PROCEDURE: Review invoices for validity and accuracy

Performance Objective

Given a purchase order, a shipment of supplies, and an invoice, determine if the shipment of supplies and the billing are correct. Discrepancies and back orders must be noted and consistent with those found by the instructor. (1)

Performance Guide

1. Check the shipment of supplies against the invoice and the purchase order when instructor receives a shipment of supplies.
2. Check all items in shipment with items listed on invoice.
3. Compare invoice with purchase orders.
4. Make note of discrepancies and back orders.

PROCEDURE: Process incoming mail

Performance Objective

Given an assortment of incoming mail or a list describing incoming mail, prepare a list determining the route of that mail. (1/10)

Performance Guide

1. Use the following criteria to complete the list:
   a. Ascertain doctor's preference for handling mail:
      1. business
      2. personal
   b. Open mail and clip the return address from the envelope if the return address does not appear on the letterhead.
   c. Do not open mail marked personal.
   d. Process mail
      1. payments
      2. bills and invoices
      3. advertisements
      4. magazines
   e. Stamp receiving date.
   f. Place personal letters in doctor's office.
   g. Hold for prompt action those items such as payments and insurance.
   h. Place appropriate magazines in waiting room or doctor's private office.
   i. Inform doctor of important correspondence needing immediate attention.
   j. Hold bills and invoices for prompt action.
   k. Make certain all containers, such as envelopes, are empty before discarding.
2. Submit list to instructor.

PROCEDURE: Order supplies

Performance Objective

Given a list of expendable supplies, a purchase order form, and a medical or dental supplier's catalogue, prepare the purchase order for the needed supplies. When completed, the order should show an accurate description of each item, the listed price, quanity, and the total amount of the cost for the order. (12)

Problem

Your instructor will provide you with a list of expendable supplies, purchase order forms, and a medical or dental supplier's catalogue. Prepare the order.

Performance Guide

1. Prepare purchase order in duplicate:
   a. list the name of item and description
   b. list price of the item
   c. list quantity of the item
   d. total the amount
2. File duplicate copy of purchase order.
3. Mail original copy of order to supplier.

PROCEDURE: Complete Medicare forms

Performance Objective

Given a patient's ledger card, medical history file, and a request for Medicare Payment (Form SSA k490), complete the form for the patient. All of the required information must appear on the form without error. (10)

Problem

Your instructor will provide a patient, the patient's file and a Request for Medicare Payment form. Complete form.

Performance Guide

1. Determine whether the patient currently carries Medicare Part B. by asking for his identification card (or obtain information from the file).
2. Note the claim number (social security number plus a letter) on the card. Write this in the patient's records.
3. Prepare Medicare form:
   a. Fill in patient's name exactly as it appears on Medicare identification card.
   b. Fill in number on identification card, being sure to include letter. Check whether male or female.
   c. Fill in patient's full address and telephone number.
   d. Fill in section asking for description of illness or injury, or if physician fills in lower part, this part can be deleted. Check whether work related.
   e. Fill in patient's commercial health insurance number.
   f. Have patient sign and date the form.
   g. Fill in section concerning date and description of service, the procedure code for the service provided, nature of illness, charges and place services were performed.
   h. Complete section requiring doctor's name, address, and telephone number. The fiscal agent will supply the code number.
   i. Enter amount paid by patient, if any, and amount of unpaid balance.
   j. Check assignment of patient's bill. This must be completed.
   k. Fill in facility where service was performed.
   l. Have doctor sign bill, indicate his degree, and date the form.
4. Keep duplicate copy for office files.
5. Put date claim was filed on patient's ledger card.
6. Mail original to designated office.

NOTE TO INSTRUCTORS: Blue Cross-Blue Shield is now the fiscal intermediary for Medicare in Pennsylvania. Current medicare forms and directions for use may be obtained from:

Pennsylvania Blue Shield
Box 62
Camp Hill, PA 17011

PROCEDURE: Complete Medicaid forms

Performance Objective

Given a patient's ledger card, medical history file, and Medicaid claim form, complete the form. All the required informaiton must be filled out according to Medicaid guide lines and content must be verified by the ledger chart. (10)

Performance Guide

1. Ascertain rules for filing claim.
2. Review form and Medicaid guidelines.
3. Complete the form.
   a. Type in patient's name and medical assistance card number.
   b. Complete the report of services section including:
      (1) exact dates of treatment
      (2) site of services
      (3) procedure number (whether service was as attending physician, consulting physician, or radiological or pathological services rendered)
      (4) nature of illness or injury
      (5) charges
4. Have physician sign form.
5. Keep copy for files.
6. Put date claim was filed on patient's ledger card.
7. Mail original to designated office.

NOTE TO INSTRUCTORS:

Current Medicaid forms and directions for their use may be obtained from:

a. Your Local Bureau of Medical Assistance
b. Director, Bureau of Medical Assistance
   Department of Public Welfare
   Health and Welfare Building
   Harrisburg, PA 17120

PROCEDURE: Complete Blue Shield Forms

Performance Objective

Given a patient's ledger card, medical history file, and Blue Shield Form, complete the form. All the required information must be filled out according to Blue Shield guidelines and content must be verified by the ledger chart.

Problem

Your instructor will provide a patient's medical history file and a Blue Shield form. Prepare the form for filing claim.

NOTE TO INSTRUCTOR:

Current Pennsylvania Blue Shield Forms and directions for their use may be obtained from:

Pennsylvania Blue Shield
P.O. Box 62
Camp Hill, PA 17011

PROCEDURE: Complete Champus Form

Performance Objective

Given a patient's ledger card, medical history file, and champus claim form, complete the form. (14)

Performance Guide

1. Type name of patient.
2. Type date of birth.
3. Type address of patient with zip code.
4. Identify relationship of patient to service member.
5. List identification number with effective and expiration dates.
6. Complete basis for care, if applicable.
7. Type name of sponsor who is a service member.
8. Type service number of sponsor.
9. Type social security number of sponsor.
10. Type service grade (rank) of sponsor.
11. Type organization and duty station.
12. Check sponsor's branch of service.
13. Check sponsor's military status.
14. Have patient read and sign certification.
15. Type name and address of source of care and check related information.
16. Type name and title of individual ordering care.
17. Type inclusive dates of care.
18. Type medical diagnosis.
19. List hospitalization, if applicable.
20. Complete dates of service, description of service, charges, procedure code and related information.
21. Repeat name of source of care, date and prepare for signature of physician.

NOTE TO INSTRUCTORS:

Blue Cross-Blue Shield is the fiscal intermediary in Pennsylvania for Champus and Champ - VA. Additional information may be obtained from;

Pennsylvania Blue Shield
P.O. Box 62
Camp Hill, PA 17011

PROCEDURE: Complete workmen's compensation forms

Performance Objective

Given a patient's ledger card, medical history file, and workmen's compensation forms, complete the claim. All of the required information must appear on the forms without error as compared with the input on the patients ledger card. (10)

Performance Guide

1. Ascertain state regulations concerning workmen's compensation.
2. Using the information in the patient's medical history file , complete the workmen's compensation form in quadruplicate: one copy each for worker's employer, insurance, carrier, Workmen's Compensation Board, and office files.
3. Have physician sign the form.
4. Mail the form.
5. Two weeks after the first treatment, send progress report to the same offices on the same form.
6. Send reports every three or four weeks thereafter until patient is discharged.
7. Mark the last report "Final Report".
8. Update the patient's ledger card as each claim is filed and paid.

NOTE TO INSTRUCTORS:

Current workmen's compensation forms and directions for their use may be obtained in Pennsylvania from:

Bureau of Occupational Injury and Disease Compensation
Department of Labor and Industry
Labor and Industry Building
Harrisburg, PA 17120

PROCEDURE: Complete Dental Insurance Forms

Performance Objective

Given dental insurance forms, a patient's insurance policy number, employer's name and group number, and all other necessary information, prepare the insurance papers for the collection of the dental services provided to the patient. (1)

Performance Guide

1. Identify purpose for dental insurance plans.
2. When patient registers obtain:
   a. name of the insurance company
   b. type of benefits
   c. patient's insurance policy number
   d. employer's name and group number
   e. type of insurance carried
3. Identify policy regulations.
4. Ascertain how payment will be made:
   a. by insurance company to dentist
   b. by patient with reimbursement by the insurance company
5. Prepare papers completing all items of information needed by the insurance company.
6. Have dentist complete the dental part of the report.
7. Check fee schedule.
8. Itemize services for payment.
9. Check papers for accuracy and completeness.
10. Address envelope, and mail papers to insurance company.

NOTE TO INSTRUCTORS:

Information for the completion of Dental Blue Shield can be obtained from:

Pennsylvania Blue Shield
P.O. Box 62
Camp Hill, PA 17011

SECTION IV - DENTAL ASSISTANT

Dental assistants are individuals prepared to assist the licensed dentist in private offices, group practice, dental clinics, or federal agencies. Today, the dental assistant's primary function is to assist the dentist at chairside. A recent regulation of the State Dental Council and Examining Board has increased the scope of the procedures that the assistant may perform under the direct supervision of the dentist. Certain laboratory duties may also be performed, and in some offices the assistant may work as receptionist and secretary.

The following procedures are relevant to the dental assistant phase of the Health Assistant Curriculum.

PROCEDURE: Handwashing

Performance Objective

Given the necessary equipment and supplies perform the handwashing procedure necessary to maintain a standard of asepsis and reduce the risk of cross infection. All items on the instructor's ckecklist must be acceptably completed. (1)

Safety Factors

1. It is necessary to use good handcream to prevent dry, rough skin.
2. Fingernails should be cleaned with orangewood stick in the beginning of the day.

Equipment and Supplies

1. Soap
2. Running water
3. Paper towels
4. Orangewood stick
5. Hand cream

Performance Guide

1. Roll or push sleeves up the arm midway between elbow and wrist.
2. Remove rings and watch.
3. Wet hands and soap; leave water running.
4. Soap hands, and cover hands with lather.
5. Rinse hands and reapply soap.
6. Using a friction motion wash palms.
7. Wash back of hands using the same motion.
8. Wash thumbs by rubbing against forefinger, or agitate by using thumb and forefinger of opposite hand.
9. Wash in between fingers.
10. Lock fingers together cupping hands together and creating a suction motion.
11. Rinse hands holding fingers down so water will run off the tips.
12. Dry hands throughly with towel.
13. Use paper towel to turn off faucet.
14. Discard paper towel in waste receptacle.

INSTRUCTOR CHECKLIST: Follow approved handwashing procedures

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Rolled up sleeves to midway between elbows and wrist		
2. Removed rings and watch		
3. Turned on faucet and wet hands and bar of soap; left water running		
4. Applied soap and covered hands with lather		
5. Rinsed hands and reapplied soap		
6. Used friction motion to wash palms and back of hands		
7. Rubbed thumbs against forefinger		
8. Washed in between each finger		
9. Locked fingers together cupping hands and creating a suction motion		
10. Held hands with fingers pointed downward and rinsed off soap		
11. Dried hands thoroughly with paper towel		
12. Used paper towel to turn off faucet		

*All steps must be rated acceptable.

INSTRUCTOR CHECKLIST: Follow approved handwashing procedures (Cont'd)

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
13. Discarded paper in waste receptacle		

*All steps must be rated acceptable.

PROCEDURE: Seating the patient

Performance Objective

Given a student-patient, demonstrate the correct procedure for seating and preparing the patient for a dental procedure. All steps on the instructor's checklist must be completed acceptably. (1)

Equipment and Supplies

1. Dental chair
2. Tissues
3. Drape
4. Light

Performance Guide

1. Address patient by name.
2. Escort patient to operatory.
3. Encourage patient to feel at ease.
4. Adjust dental chair to lowest position.
5. Assist patient in being seated.
6. Adjust backrest level with lower part of the patient's shoulder blades.
7. Adjust headrest to support head near base of skull.
8. Ascertain if headrest is comfortable for patient.
9. Position chair to correct height and tilted to proper position for dentist.
10. Request patient to remove false teeth and glasses (if necessary).
11. Place patient's personal items in a safe place.
12. Hand tissue to female patient and request she remove lipstick.
13. Drape patient.
14. Adjust light directing it toward the treatment area.
15. Introduce new patient to dentist.

INSTRUCTOR CHECKLIST: Seating the patient

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Addressed patient by name		
2. Escorted patient to operatory		
3. Encouraged patient to feel at ease		
4. Adjusted dental chair to lowest position		
5. Assisted patient in being seated		
6. Adjusted back rest level with lower part of the patient's shoulder blades		
7. Adjusted headrest to support head near base of skull		
8. Asked patient if position of headrest was comfortable		
9. Positioned chair to correct height and tilted to proper position for dentist		
10. Requested patient to remove false teeth and glasses, if necessary		
11. Placed patient's personal items in a safe place		
12. Handed tissue to female and requested her to remove lipstick		

*All steps must be rated acceptable.

INSTRUCTOR CHECKLIST: Seating the patient
(Cont'd)

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
13. Placed bib or plastic apron on patient and secured drape		
14. Adjusted light directing it toward the treatment area		
15. Introduced new patient to dentist		

*All steps must be rated acceptable.

PROCEDURE: Give instruction in oral hygiene

Performance Objective

Given a patient and the necessary supplies and equipment, instruct the patient in oral hygiene. All steps on the instructor's checklist must be acceptably completed. (12)

Equipment and Supplies

1. Visual aids
2. Toothbrush
3. Dental Floss
4. Mouth wash
5. Tooth Paste

Performance Guide

1. Determine the patient's needs for instruction in oral hygiene.
2. Introduce the subject of preventive dental care.
3. Explain oral hygiene as a means of prevention.
4. Use visual aids to demonstrate explanations of periodontal disease and caries, and plaque control.
5. Apply disclosing solution to teeth. Have patient view results.
6. Demonstrate proper toothbrushing techniques.
7. Demonstrate the use of dental floss.
8. Explain use of mouth wash.
9. Explain the use of oral irrigation devices.
10. Reinforce instruction by having patient demonstrate brushing and flossing techniques.

INSTRUCTOR CHECKLIST: Give instruction in oral hygiene

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Explained oral hygiene as a means of prevention		
2. Used visual aids to demonstrate explanations of periodontal disease and caries, and plaque control		
3. Applied disclosing solution to teeth and had patient view results		
4. Demonstrated proper toothbrushing techniques		
5. Demonstrated the use of dental floss		
6. Explained use of mouth wash		
7. Explained the use of oral irrigation devices		
8. Reinforced instruction by having patient demonstrate brushing and flossing techniques		

*All steps must be rated acceptable.

PROCEDURE: Prepare set-up for prophylaxis

Performance Objective

Given the necessary equipment and supplies, prepare set-up for cleaning and polishing teeth. All items on the instructor's checklist must be acceptably completed. (1)

Safety Factors

Prophylaxis may only be done by Dentist or Hygienist

Equipment and Supplies

1. Dental instruments (mirror, probe, explorer, scalers, hoes, chisel, curet, files)
2. Supplies
3. Polishing materials
4. Gauze sponges

Performance Guide

1. Read patient's treatment plan for type of prophylaxis planned for patient.
2. Assemble patient's record and place in operatory.
3. Place X-rays in view box.
4. Assemble instruments (mirror, probe, explorer, scalers, hoes, chisel, curet, files) and arrange in sequence of use on tray.
5. Place gauze sponges on tray.
6. Prepare handpiece.
7. Place polishing material and disclosing tablets in a convenient area.
8. Prepare saliva ejector.
9. Check for completeness of set-up.

INSTRUCTOR CHECKLIST: Prepare set-up for prophylaxis

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Identified definition of oral prophylaxis		
2. Identified objectives related to oral prophylaxis		
3. Assembled patient's record		
4. Assembled armamentarium		
5. Prepared handpiece		
6. Prepared saliva ejector		
7. Checked set-up for completeness		

*All steps must be rated acceptable

PROCEDURE: Prepare set-up for anticarogenic treatment

Performance Objective

Given a plan for an anticarogenic treatment and the necessary supplies and equipment, assemble the armamentarium and set-up for the treatment. Upon inspection, the set-up must be arranged according to the established procedure for the type of anticarogenic treatment indicated on the plan. (12/19)

Safety Factors

Check patient for allergic reactions

Equipment and Supplies

1. Perscribed fluoride
2. Tray
3. Dental instruments
4. Timer

Performance Guide

1. Prepare set-up for application of stannous fluoride.
   a. Read patient's treatment plan to determine the prescribed medicament.
   b. Select armamertarium and arrange tray set-up.
   c. Select correct dosage of stannous fluoride to prepare the prescribed solution.
   d. Assemble mixing equipment and supplies and place in a convenient area.
   e. Prepare saliva ejector.
   f. Prepare air syringe.
   g. Obtain timer and place in operatory.
   h. Check completed set-up for completeness.
2. Prepare set-up for application of fluoride gel preparation.
   a. Read patient's treatment plan to determine the prescribed medicament,
   b. Select armamentarium and arrange tray set-up.
   c. Secure fluoride gel preparation and place on tray.
   d. Prepare saliva ejector and air syringe.
   e. Obtain timer and place in operatory.
   f. Check completed set-up for completeness.

PROCEDURE: Chart oral conditions as dictated by the dentist

Performance Objective

Given the necessary equipment and supplies, chart the oral conditions as the dentist dictates during his examination of the oral cavity. The information must be accurately recorded, using the correct dental terms and symbols. (1)

Equipment and Supplies

1. Oral examination form
2. Marking pencils and pens

Performance Guide

1. Identify abbreviations and symbols used in dentistry.
2. Identify anatomical terms related to the structure of a tooth.
3. Record information during the dental examination in the following manner:
   a. Prepare set-up for oral examination.
   b. Obtain dental history record form.
   c. Label form and fill in the information blanks.
   d. Assemble colored marking pens.
   e. Identify dentist's methods of identifying teeth, classifying cavities, etc.
4. As dentist dictates record:
   a. missing teeth
   b. existing restorations
   c. new caries
   d. bridges and crowns
   e. occlusion or bite
   f. pathological conditions of tissues and oral cavity

PROCEDURE: Prepare for administration of local anesthetic injection

Performance Objective

Given the necessary equipment and supplies, prepare an anesthetic syringe and set up for the administration of a local anesthetic. (1)

Safety Factors

Asepsis must be maintained, and the syringe correctly prepared with the needle securely attached and protected from contamination.

Equipment and Supplies

1. Anesthetic
2. Syringe
3. Disposable needles
4. Gauze sponges

Performance Guide

1. Assemble equipment and materials.
2. Inspect aspirating syringe for any defects.
3. Inspect carpels of local anesthetic for possible deterioration or contamination of the solution.
4. Select disposable needles.
5. Preparing syringe:
   a. Place carpel into side of syringe.
   b. Engage harpoon into carpel by applying rapid thumb pressure to the thumb ring.
   c. Mount needle according to operator's preference.
   d. Remove protective shield from needle and expel several drops of solution to remove air from carpel.
   e. Check bevel position of needle to facilitate the placement of bevel towards bone.
   f. Replace protective shield on needle.
6. Place prepared syringe, gauze sponges and topical anesthetic ointment on tray or bracket table.

PROCEDURE: Assist with the administration of local anesthesia

Performance Objective

Given a patient and the necessary supplies and equipment, assist the dentist in administering the anesthetic. All steps in the instructor's checklist must be acceptably completed. (1/11)

Safety Factors

1. Make sure that point of needle is not contaminated in passing the syringe.
2. Take precautions to protect point of needle so that the skin of dentist and dental assistant is not pricked after use.

Equipment and Supplies

1. Gauze sponge
2. Aspirating syringe

Performance Guide

1. Identify dental assistant's position in the operative zone.
2. Note operator is ready to begin the procedure.
3. Hand operator a gauze sponge for drying the area to be injected.
4. Pass aspirating syringe and:
   a. Secure thumb ring over operator's thumb with left hand.
   b. With right hand, position barrel between operator's fingers. Grasp barrel with left hand and remove needle shield with right hand.
   c. Orient bevel with left hand by rotating barrel so window of syringe is toward the operator for visibility of solution.
   d. Extend left arm across patient for any sudden movement.
5. Secure air/water syringe and suction in right hand.
6. Retract patient's lips as indicated.
7. Receive syringe from operator, replace shield on needle and place syringe on tray.
8. Rinse patient's mouth and aspirate.
9. Observe patient for reaction to anesthetic:
   a. color change
   b. excessive perspiration
   c. change in rate of respiration
   d. unusual body movements

INSTRUCTOR CHECKLIST: Assist with the administration of local anesthesia

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Patient was seated and prepared for the treatment.		
2. Topical anesthetic was applied to area of injection		
3. Passed gauze sponge for dentist to dry area		
4. Passed aspirating syringe to dentist		
5. Extended left arm across patient to prevent sudden movement		
6. Retracted patient's lips as indicated		
7. Received syringe from operation, replaced shield on needle		
8. Rinsed patient mouth and aspirated		
9. Observed patient for reaction to anesthetic		

*All steps must be rated acceptable.

PROCEDURE: Prepare for cavity preparation

Performance Objective

Given a treatment plan and the necessary supplies and equipment, set up the operatory for the preparation of carious lesions as indicated by the treatment plan. All items on the instructor's checklist must be acceptably completed. (1/16)

Equipment and Supplies

1. Patient's record
2. X-rays
3. Dental instruments

Performance Guide

1. Prepare for cavity preparation.
   a. Read patient's treatment plan to determine type of cavity preparation and area of work.
   b. Assemble patient's record and place in operatory.
   c. Place X-rays in view box.
   d. Disinfect air and water syringe, light, chair and all areas the patient will contact.
   e. Prepare evacuation equipment.
   f. Place bur in handpieces.
   g. Assemble instruments, supplies and set-up trays.
   h. Prepare isolation (rubber dam) tray (if necessary)
   i. Prepare local anesthetic syringe.
   j. Place restorative materials and mixing supplies in a convenient area.
2. Check operatory and make certain preparations have been completed.

INSTRUCTOR CHECKLIST: Prepare for cavity preparation

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Assembled and placed patient's record in operatory. Read treatment plan.		
2. Disinfected air/water syringe		
3. Placed clean headrest cover on chair		
4. Placed X-rays in view box		
5. Prepared evacuation equipment		
6. Prepared local anesthetic syringe and set-up		
7. Inserted appropriate bur in handpiece		
8. Assembled appropriate instruments and set-up tray		
9. Prepared isolation (rubber dam) tray		
10. Assembled restoration material and placed in convenient area near chair		
11. Made final check of prepared operatory		

*All steps must be rated acceptable.

PROCEDURE: Assist with cavity preparation

Performance Objective

Given the necessary equipment and supplies, seat and prepare the patient and assist the instructor/dentist in the preparation of the type of cavity indicated in a treatment plan. All steps in the instructor's checklist must be completed without error. (1/16)

Safety Factors

Pass and receive instruments to prevent injury to patient, dentist and dental assistant.

Equipment and Supplies

1. Patient's chart
2. X-rays
3. Instruments necessary for cavity restoration

Performance Guide

1. Read patient's chart for area of operation and review of medical history. Place record in operatory.
2. Place X-rays in view box.
3. Set up for cavity preparation and restoration.
4. Seat and prepare patient.
5. Wash hands.
6. Introduce doctor (if this is a new patient)
7. Rinse and aspirate patient's mouth
8. Assist with the administration of local anesthetic.
9. Perform instrument exchange.
10. Maintain field of operation.
11. Prepare handpiece.
12. Perform bur exchange.
13. At completion of instrumentation, flush and dry cavity.
14. Ascertain if base or liner will be needed.

INSTRUCTOR CHECKLIST: Assist with cavity preparation

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Read patient's chart for area of operation and review of medical history; placed record in operatory		
2. Placed X-rays in view box		
3. Set up for cavity preparation and restoration		
4. Seated and prepared patient		
5. Washed hands		
6. Introduced doctor (if this was a new patient)		
7. Rinsed and aspirated patient's mouth		
8. Assisted with the administration of local anesthetic		
9. Performed instrument exchange		
10. Maintained field of operation		
11. Prepared handpiece		
12. Performed bur exchange		

*All steps must be rated acceptable.

INSTRUCTOR CHECKLIST: Assist with cavity preparation

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
13. Flushed and dried cavity at completion of instrumentation		
14. Ascertained if base or liner would be needed		
15. Prepared for restoration phase of the procedure		

*All steps must be rated acceptable.

PROCEDURE: Assist with cavity preparation

Performance Objective

Given an illustration of carious lesions, classify all the lesions according to the classification given by C.V. Black. (11)

Performance Guide

1. Identify cause of carious lesions.
2. Trace the development of a class VI carious lesion.
3. Identify complications that can occur as a result of dental caries.
4. Identify systems of classification.
   a. C.V. Black classification
      (1) pit and fissure cavities - Class I
      (2) posterior interproximal cavities - Class II
      (3) anterior interproximal cavities - Class III
      (4) anterior interproximal cavities involving the incisal edge - Class IV (also called mesioincisal [MI] or distoincisal [DI] cavities - Class V
   b. C.N. Johnson classification
      (1) simple cavities involving one surface of a tooth
      (2) compound cavities involving two surfaces of a tooth
      (3) complex cavities involving three or more surfaces of a tooth

ANTERIOR

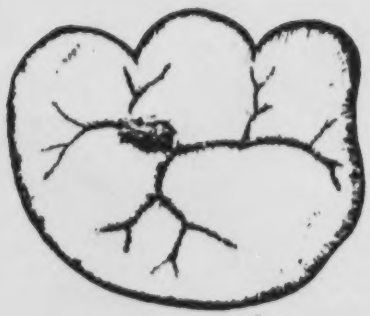
CLASS V LESIONS

CLASS III LESIONS

CLASS IV LESIONS

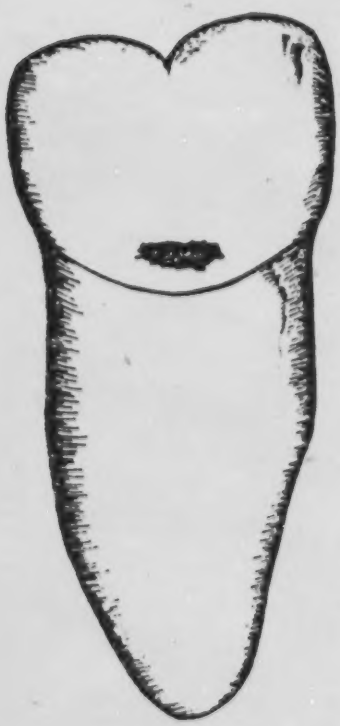
POSTERIOR

CLASS II LESIONS



CLASS I LESIONS

CLASS II LESIONS



CLASS V LESIONS

PROCEDURE: Maintain asepsis while handling sterile items

Performance Objective

Given the necessary equipment and supplies, demonstrate the technique for handling sterile items. No part of sterile surface will be contaminated. (1)

Safety Factors

When in doubt of sterility do not use.

Equipment and Supplies

1. Sterile supplies
2. Tray set-up
3. Sterile instruments
4. Transfer forcep
5. Disinfectant solution

Performance Guide

1. Identify need for asepsis in a dental office.
   a. patient protection
   b. dental team protection
2. Identify ways infection is spread.
3. Identify sources of bacteria.
4. Demonstrate techniques for unwrapping sterile packages.
   a. Remove tape (if this has been used to seal package).
   b. Hold package out and away from uniform.
   c. Grasp top flap back letting it drop to opposite side of package.
   d. Fold side flaps back and let wrapper drop to side (open one side at a time).
   e. Fold bottom flap back being sure that it does not touch any part of the uniform.
   f. Hand sterile items to operator or gently drop it onto a sterile surface.
   g. If package is sealed, grasp sealed edges and pull apart.
   h. If package is placed on a hard surface for opening, use the "fold back and away" technique.
5. Demonstrate techniques for handling sterile items on a tray.
   a. Do not reach across the tray.
   b. Maintain a dry surface at all times.
   c. Discard soiled sponges and other contaminated items.
   d. Leave all items dropped on floor on the floor until procedure is over.
6. Demonstrate techniques for handling transfer forceps.
   a. When removing forceps from solution, lift forceps straight up from the jar.

Performance Guide (Continued)

b. Keep tips of forceps pointed downward at all times.
c. Keep forceps in line of vision at all times.
d. When transferring a sterile item, avoid touching the tips of the forceps on the sterile field where the item is to be placed.
e. Replace forceps in solution immediately following use.
f. Change solution in forcep jar as necessary.

PROCEDURE: Evacuate oral cavity during a dental procedure

Performance Objective

Given the necessary equipment and supplies, evacuate the oral cavity. (1)

Safety Factors

A clear field of vision must be maintained for the dentist

Equipment and Supplies

1. Air/water syringe
2. High-velocity suction tip

Performance Guide

1. Identify equipment necessary to maintain a clean and clear field of vision during a dental procedure.
2. Identify parts of the air/water syringe.
3. Identify parts of the high-velocity suction tip.
4. Identify dental procedures in which evacuation techniques are essential to the dentist's progress in the treatment.
5. Identify zone of operation.
   a. dentist's position
   b. assistant's position
6. Identify methods of approach.
7. Use pen grasp for better control manipulation of tip.
8. Demonstrate use of water syringe.
9. Position the suction tip prior to operator's positioning of a headpiece and mirror.
10. Position tip as close as possible to the teeth being prepared, taking precaution to prevent injury to the soft tissue.
11. Position tip so the beveled tip opening is held parallel with the buccal or lingual surface of the tooth being prepared.
12. Position tip so that the edge of the tip is even with the occlusal surface of the tooth being prepared.

PROCEDURE: Apply and remove vac-ejector

Performance Objective

Given the necessary equipment and supplies, demonstrate the correct technique for placing the evacuator in the upper and lower arch and removing it following a dental operative procedure. All steps in the instructor's checklist must be completed acceptably. (15)

Safety Factors

Select appropriate size vac-ejector

Equipment and Supplies

1. Vac-ejector

Performance Guide

1. Identify purpose for using a vac-ejector.
2. Identify advantages and disadvantages for using this method of oral evacuation.
3. Identify parts of the vac-ejector.
4. Demonstrate procedures for assembling the equipment.
5. Identify care of vac-ejector.
6. Place the vac-ejector:
   a. Determine the arch size, shape, and vertical dimension in the retromolar area.
   b. Select the appropriate size equipment to fit oral cavity.
   c. Assemble the vac-ejector. Trim mouthpiece as necessary.
   d. Prepare patient.
   e. Upper-arch insertion:
      (1) Place patient in supine position.
      (2) Place vac-ejector within the mouth. Insert the mouthpiece first into the vestibule, and push the bite block into the anterior region.
      (3) Draw bite block over between posterior teeth and slip mouthpiece into position between the upper and lower-arch opposite.
      (4) Manually draw patient's cheek up to cover the bite block.
      (5) Rotate the ejector pipe into bite block and center mouthpiece.
      (6) Attach vacuum hose.
   f. Lower arch insertion:
      (1) Place patient in upright position.
      (2) Insert mouthpiece over the lower anteriors and into the oral cavity proper between tongue and arch using an up-and-over, down-and-back motion.
      (3) Place bite block betwen the anteriors; press it outward to its position between the molars.
      (4) Adjust mouthpiece distally and rotate ejector pipe in bite block and mouthpiece.
   g. Check to be sure vac-ejector is placed properly.

Performance Guide (Continued)

7. Remove vac-ejector:
   a. Aspirate retained debris from oral cavity.
   b. Remove vac-ejector from one arch at a time.
   c. Care for patient.
   d. Clean vac-ejctor and sterilize.

INSTRUCTOR CHECKLIST: Apply and remove vac-ejector

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Assembled materials		
2. Selected appropriate size vac-ejector		
3. Assembled vac-ejector		
4. Explained procedure to patient		
5. Washed hands		
6. Upper arch insertion		
a. Positioned patient in supine position		
b. Inserted vac-ejector into mouth and positioned it		
c. Evaluated placement and made adjustments (if necessary)		
7. Lower arch insertion:		
a. Positioned patient in upright position		
b. Inserted mandibular mouthpiece and positioned it		

*All steps must be rated acceptable.

INSTRUCTOR CHECKLIST: Apply and remove vac-ejector
(Con't)

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
c. Cared for patient		
d. Dismissed patient		
e. Cleaned and sterilized vac-ejector		

*All steps must be rated acceptable.

PROCEDURE: Apply saliva ejector

Performance Objective

Given a patient, insert the saliva ejector into the patient's mouth. All steps on the instructor's checklist must be acceptably completed. (1)

Safety Factors

1. Make sure that there is no pinched or pressure area of the lower lip.
2. Make sure that suction is ajusted to prevent drawing up of mucous membrane.

Equipment and Supplies

1. Saliva ejector
2. Low-velocity suction system

Performance Guide

1. Assemble saliva ejector and attach to low-velocity suction system.
2. Seat patient.
3. Wash hands
4. Explain procedure to patient and gain his/her cooperation.
5. Insert ejector into patient's mouth:
   a. Hook curved end over the lower teeth opposite side of area to be treated.
   b. Stabilize ejector.
   c. Ascertain if patient feels any discomfort and make the necessary adjustments.
6. Activate the suction.

INSTRUCTOR CHECKLIST: Apply saliva ejector

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Assembled saliva ejector and attached to low-velocity suction system		
2. Seated patient		
3. Washed hands		
4. Explained procedure to patient and gained his/her cooperation		
5. Inserted ejector into patient's mouth:		
a. hooked curved end over the lower teeth opposite side of area to be treated		
b. stabilized ejector		
c. ascertained if patient felt any discomfort and made the necessary adjustments		
6. Activated the suction		

*All steps must be rated acceptable.

PROCEDURE: Prepare composites for restoration

Performance Objective

Given the necessary equipment and supplies, mix the composite and deliver the mixture to the dentist for placement in the prepared cavity. (1/16)

Safety Factors

Make sure the completed mixture is evenly blended, workable, and free of any foreign particles.

Equipment and Supplies

1. Composite resin base
2. Catalyst
3. Jars of tint
4. Mixing stick and pad
5. Gauze sponges

Performance Guide

1. Assemble material for mixing
2. Prepare mix in the following manner:
   a. Stir contents of catalyst and base jars before making the first mix to make certain filler has not settled to the bottom. Use orange wood stick or agate spatula or plastic disposable stick for mixing. USE DIFFERENT ENDS OF THE SPATULA FOR CATALYST AND BASE TO PREVENT DISTRUCTION OF THE MATERIALS.
   b. Dispense equal amounts of base and catalyst on pad.
   c. If necessary, add color shade.
   d. Mix the two portions of paste for a period of 20-30 seconds using the spatula or stick.
   e. Observe the following characteristics during mixing:
      1. homogeneity of mix
      2. workability-non-setting, plastic stage
      3. absence of foreign particles
   f. Place mixed composite near the edge of the pad.
   g. Deliver composite resin mix to the operator.
      1. With the right hand deliver the composite resin on the pad close to the patient's mouth.
      2. Simultaneously, hold a gauze sponge with the left hand close to the patient's mouth to wipe the placing instrument.
3. Clean up operatory.

PROCEDURE: Prepare amalgam for restoration

Performance Objective

Given the necessary equipment and supplies, prepare, mix, and deliver the amalgam to the instructor/dentist. When completed, the material must have a uniform smoothness with a slight metallic appearance and must not crumble. (1/18)

Safety Factors

1. When working with mercury all jewelery must be removed.
2. Skin contact with mercury must be kept at a minimum.

Equipment and Supplies

1. Dental amalgam alloy
2. Electrical triturator

Performance Guide

1. Identify properties of dental amalgam alloy material.
2. Assemble pellets of dental amalgam alloy and armamentarium
   a. mechanical triturator
   b. alloy pellets that are complete (unbroken)
   c. clean mercury in a pre-set mercury dispenser
   d. clean capsule and pestle with a tight fitting cap
   e. clean cotton pliers
   f. clean amalgam well (or new squeeze cloth)
   g. clean amalgam carrier
3. Arrange items in a convenient working area.
4. Check triturator to be sure it is working.
5. Load capsule on electrical triturator with mercury - one drop for each pellet of alloy that will be placed in the capsule.
6. Using cotton pliers, add the pestle, if indicated, to the loaded capsule.
7. Using cotton pliers or pellet dispenser, add the desired number of pellets to the large end of the capsule.
8. Place the short end or cap of the capsule securely over the loaded end.
9. Triturate.
   a. Place loaded capsule in prongs of amalgamator and activate.
   b. Mull material (if indicated).
   c. When trituration cycle is complete, remove the capsule from the amalgamator.
   d. Remove end of capsule and dispense contents in the amalgam well.
   e. Using cotton pliers, remove the pestle and replace the amalgam into the capsule.
   f. Place the end on the capsule and replace the capsule in the triturator. Activate triturator for 2-3 seconds.

Performance Guide continued - Amalgam

10. Inspect the triturated amalgam for the following:
    a. smoothness-homogeneity, no lumps and uniform throughout
    b. shiny-slight metallic appearance
    c. plastic-retains its shape when deformed but does not crumble
    d. remove excess mercury if necessary by "squeezing".
11. Load amalgam carrier and hand to operator.
12. Clean up operatory
13. Save all unused amalgam for reclaiming.

PROCEDURE: Assist with amalgam restoration

Performance Objective

Given the necessary supplies equipment, prepare the amalgam and assist the dentist with the cavity restoration. All steps in the instructor's checklist must be completed with a satisfactory rating. (1/17).

Equipment and Supplies

1. Matrix retainer
2. Wedge
3. Pliers or hemostat
4. Varnish
5. Amalgam
6. Carrier
7. Plugger
8. Carver
9. Burnisher
10. Band

Performance Guide

1. Identify stage of cavity preparation.
   a. Ascertain if base or liner is needed.
   b. If needed, mix base or liner and pass material to dentist.
2. Evacuate oral cavity.
3. Pass matrix retainer.
4. Pass wedge held in pliers or hemostat.
5. Prepare varnish and pass to dentist.
6. Prepare amalgam, and load carrier.
7. Pass loaded carrier to dentist. Refill as needed.
8. Pass and exchange amalgam carrier, plugger, carver and burnisher as needed.
9. Evacuate oral cavity when placement of amalgam is completed.
10. Pass explorer to free amalgam from band.
11. Pass carver if necessary.
12. Retrieve instruments, wedge, matrix retainer, and band.
13. Pass explorer to check gingival contact areas.
14. Pass carvers as needed and assist with air and suction.
15. Assist with removal of rubber dam (if placed).
16. Wash and evacuate patient's mouth.
17. Assist dentist in testing and adjusting occlusion.
18. Care for patient.
19. Give patient instructions on care of mouth.
20. Dismiss patient.
21. Reschedule appointment for polishing or next restoration as per treatment plan.
22. Clean up operatory and prepare for the next patient.

INSTRUCTOR CHECKLIST: Assist with amalgam restorations

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Identified stage of cavity preparation		
2. Evacuated oral cavity		
3. Passed wedge to dentist		
4. Prepared varnish and passed to dentist		
5. Prepared, mixed and delivered amalgam to dentist		
6. Performed instrument exchange as indicated		
7. Evacuated oral cavity as indicated		
8. Assisted dentist in testing and adjusting occlusion		
9. Cared for and instructed patient in post-operative care		
10. Dismissed patient, reappointed for polishing or next restoration as per treatment plan		
11. Cleaned up operatory and prepared for the next patient		

*All steps must be rated acceptable.

PROCEDURE: Prepare silicate cement for restoration

Performance Objective

Given the necessary equipment and supplies, prepare silicate cement for restoration. The prepared mixture must be evenly mixed and have a putty-like consistency. (1/16)

Equipment and Supplies

1. Silicate cement
2. Glass slab
3. Spatula
4. Carrier instrument

Performance Guide

1. Prepare silicate cement according to the manufacturer's directions:

    a. Assemble supplies and equipment.
    b. Cool glass slab to 65 degrees.
    c. Dry thoroughly.
    d. Dispense powder onto glass slab.
        (1) Press dispenser firmly into powder until well is firmly packed.
        (2) Level surface by pulling over rim of bottle.
        (3) Dispense on glass slab two measures from large end and one measure from small end of dispenser.
    e. Dispense liquid onto glass slab.
        (1) Shake the bottle of liquid several times before dispensing liquid.
        (2) Expel two free falling drops near powder and immediately replace cap on bottle.
    f. Using the long edge of the spatula pull in the two large portions of powder into the liquid.
    g. With flat side of blade, wet all particles of powder with the liquid.
    h. Add one-half of the remaining portion. Blend until the proper consistency is reached. Add balance of powder if needed.
    i. Complete mixing in one minute. "Mix it quick and mix it thick."
    j. Observe mixture for the following characteristics:
        (1) homogenous
        (2) putty-like consistency
        (3) moisture will rise to surface of material when spatula holding mix is lightly tapped on side of slab.

Performance Guide (continued) Silicate

2. Deliver mix to dentist.

    a. Roll approximately 1/4 of mix into a ball and place on one side of glass slab as a guide for testing setting time of material.
    b. Pull remaining mass of silicate material to one end of the mixing surface.
    c. Carry slab to area of exchange in front of patient; pass carrier instrument to operator.

3. Clean equipment and operatory.

PROCEDURE: Assist with acrylic restoration

Performance Objective

Given the necessary supplies, assist with the acrylic restoration. Each step of the instructor's checklist must be completed without error. (1)

Equipment and Supplies

Acrylic Resin material

Performance Guide

1. Identify stage of cavity preparation, and if necessary, prepare base and/or liner and pass material to dentist.
2. Mix acrylic resin material to proper consistency and shade.
3. Move prepared mix to exchange zone.
4. Pass acrylic placement instrument to dentist.
5. Hold gauze sponge in exchange zone for dentist to wipe instrument.
6. Receive placement instrument.
7. Place remaining material and gauze sponge to one side.
8. Pass sandpaper disk and strip to dentist.
9. Clean up placement instrument and assist dentist with air and water syringe and suction oral cavity.
10. Care for patient.
11. Dismiss patient from chair.
12. Schedule patient for next appointment (if necessary).
13. Clean up operatory and prepare for next patient.

INSTRUCTOR CHECKLIST: Assist with acrylic restorations

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Identified stage of cavity preparation		
2. Ascertained if base and/or liner was needed		
3. Prepared base and/or liner and passed to dentist (if necessary)		
4. Prepared, mixed, and delivered acrylic to exchange zone		
5. Passed acrylic placement instrument to dentist		
6. Held gauze sponge in exchange zone for dentist to wipe instrument		
7. Received placement instrument		
8. Placed remaining material and gauze sponge to one side		
9. Passed sandpaper disk and strip to dentist		
10. Applied air and water; suctioned area of treatment		
11. Cared for patient		
12. Dismissed patient from chair		

*All steps must be rated acceptable.

INSTRUCTOR CHECKLIST: Assist with acrylic restorations (continued)

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
13. Scheduled for next appointment (if necessary)		
14. Cleaned up operatory		

*All steps must be rated acceptable.

PROCEDURE: Explain pre-operative instructions to the patient

Performance Objective

Given a patient who is being scheduled for dental surgery, instruct the patient in the pre-operative measures to be carried out prior to the time he/she reports for the appointment. All item on instructor's checklist must be acceptably completed. (1)

Performance Guide

1. Identify pre-operative routines for various dental surgical procedures.
2. Identify type of anesthetic to be used - local or nitrous oxide.
3. Explain time for arrival at office.
4. Explain dietary restrictions if any.
5. Explain use of pre-operative medication (if this is given to the patient).
6. Explain the time to take the pre-operative medication prior to arrival in the office.
7. Explain tooth brushing and oral hygiene procedures on the morning of the appointed procedure.
8. If patient is to be hospitalized:
   a. Explain time to report to the hospital.
   b. Explain items the patient needs to take with him/her to the hospital.
   c. Explain length of stay in the hospital.
   d. Explain that the dentist will visit the patient following admission to the hospital.
   e. Inform patient regarding use of hospital insurance and payment for dental treatment, including medicare.
9. Ask patient to call dentist if unable to keep appointment.

INSTRUCTOR CHECKLIST: Explain pre-operative instructions to the patient

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Explained time for arrival at office		
2. Explained dietary restrictions, if any		
3. Explained use of pre-operative medication (if this was given to the patient)		
4. Explained the time to take the pre-operative medication prior to arrival in the office		
5. Explained tooth brushing and oral hygiene procedures on the morning of the appointed procedure		
6. If patient was to be hospitalized:		
a. Explained time to report to the hospital		
b. Explained items the patient needed to take with him/her to the hospital		
c. Explained length of stay in the hospital		
d. Explained that the dentist would visit the patient following admission to the hospital		
e. Informed patient regarding use of hospital insurance and payment for dental treatment, including medicare		

*All steps must be rated acceptable.

PROCEDURE: Prepare for oral surgery proecedure

Performance Objective

Given a treatment plan and the necessary supplies and equipment, set up the operatory for the type of tooth extraction indicated. All steps in the instructor's checklist must be acceptably completed. (1)

Equipment and Supplies

1. Patient's record
2. X-Rays
3. Dental equipment

Performance Guide

1. Prepare operatory for treatment.
   a. Read patient's treatment plan to determine type of surgical procedure and tooth or teeth to be extracted.
   b. Assemble patient's record and place in operatory.
   c. Place x-rays in view box.
   d. Disinfect air and water syringe, light, chair and all areas the patient will come in contact with.
   e. Prepare evacuation equipment.
   f. Prepare local anesthetic syringe.
   g. Prepare evacuation equipment.
   h. Assemble and arrange instruments and sponges on tray.
2. Check operatory and make certain preparations are complete and operatory is ready for use.

INSTRUCTOR CHECKLIST: Prepare for oral surgery procedures

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Read patient's treatment plan for area of treatment		
2. Assembled patient's record and placed in operatory		
3. Placed x-rays in view box		
4. Disinfected air and water syringe, light, chair and all other areas patient would come in contact with		
5. Prepared evacuation equipment		
6. Prepared local anesthetic syringe and set-up		
7. Assembled and arranged instruments and supplies on tray		
8. Selected sutures and placed on sterile tray		
9. Maintained chain of asepsis during preparations of sterile tray		
10. Checked operatory for completeness of armamentarium		

*All steps must be rated acceptable.

PROCEDURE: Assist with oral surgery

Performance Objective

Given a patient and necessary equipment and supplies, seat and prepare the patient and assist the instructor/dentist with the tooth extraction. All items on the instructor's checklist must be acceptably completed. (1)

Safety Factors

Use all precautions to prevent injury to patient, dentist and dental assistant.

Equipment and Supplies

1. X-rays
2. Explorer and Mirror
3. Periosteal elevator
4. Extraction forceps
5. Sutures

Performance Guide

1. Read patient treatment record for tooth to be extracted and review medical history. Place record in operatory.
2. Place x-rays in view box.
3. Set up operatory.
4. Seat and prepare patient. Provide reassurance.
5. Wash hands.
6. Introduce dentist to patient.
7. Assist dentist with the administration of local anesthetic.
8. Pass explorer and mirror.
9. Retrieve instruments.
10. Pass periosteal elevator.
11. Aspirate with right hand; with left hand stabilize mandible and retract cheek.
12. When stripping is completed, retrieve periosteal elevator and pass straight elevator.
13. As dentist uses elevator, aspirate with right hand and hold extraction forceps in left hand ready for transfer.
14. Retrieve elevator with little finger of left hand holding forceps, and place handle of forceps in dentists' hand.
15. Continue aspirating as dentist extracts tooth.
16. Prepare sutures and pass to dentist (if necessary).
17. Cut sutures as directed (if necessary).
18. Observe patient for bleeding.
19. Care for patient.
20. Instruct patient for bleeding.
21. Dismiss patient.
22. Reappoint if necessary.
23. Clean up operatory and prepare for the next patient.

INSTRUCTOR CHECKLIST:

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Read patient's treatment plans for area of treatment		
2. Prepared operatory		
3. Seated and prepared patient		
4. Washed hands		
5. Assisted dentist with administration of local anesthetic		
6. Identified stage of procedure and performed instrument exchange		
7. Aspirated area of treatment as needed		
8. Received extracted tooth from dentist		
9. Prepared sutures and passed to dentist (if necessary)		
10. Cut sutures as directed (if necessary)		
11. Observed patient for bleeding		
12. Cared for patient		

*All steps must be rated acceptable.

INSTRUCTOR CHECKLIST:

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
13. Gave patient post-operative instructions		
14. Dismissed patient. Reappointed (if necessary)		
15. Cleaned up operatory and prepared for next patient		

*All steps must be rated acceptable.

PROCEDURE: Explain post-operative instructions to the patient

Performance Objective

Given established post-operative home care procedures and a patient who is ready to be dismissed from the chair following oral surgery, instruct the patient in the care of his mouth to promote healing. All items on the instructor's checklist must be acceptably completed. (1)

Performance Guide

1. Identify post-operative routines for various surgical procedures.
2. Explain amount of bleeding or pain the patient may expect.
3. Give instructions in methods for controlling bleeding (if necessary).
4. Explain mouth-washing techniques.
5. Give dietary restrictions (if necessary).
6. Explain when sutures will need to be removed (if these have been placed).
7. Give patient home care kit and explain its use.
8. Tell patient to call dentist if complications occur (uncontrolled pain, hemorrhage, or swelling).
9. Explain that dentist will call the next day to check his/her progress (if this is the policy of the dentist).

INSTRUCTOR CHECKLIST:

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Explained amount of bleeding or pain patient might expect		
2. Instructed patient in methods for controlling bleeding		
3. Instructed patient in mouth washing techniques, and when to wash mouth		
4. Instructed patient in dietary restriction		
5. Explained when sutures will be removed (if placed)		
6. Gave patient home care kit and explained use of sponges and medications		
7. Instructed patient to call doctor if complications occured		
8. Explained that dentist will call the next day		

*All steps must be rated acceptable.

PROCEDURE: Prepare cement as a protective base. (Zinc phosphate cement).

Performance Objective

Given the necessary equipment and supplies, prepare, mix and deliver the cement to the dentist. The prepared mix must be the right consistency for use as a protective base or cementation purposes. (12)

Equipment and Supplies

1. Zinc phosphate cement
2. Manufacturer's instructions

Performance Guide

1. Prepare the mix.
   a. Assemble equipment and materials
   b. Cool dry glass slab to 65 degrees
   c. Dispense desired amount of powder onto slab at one end (replace stopper).
   d. Use spatula and form powder into thin, flat, rectangular shape.
   e. Divide powder into halves, quarters, eighths, and 4 eighths into halves.
   f. Agitate bottled liquid and place liquid onto end of slab opposite the powder. Replace stopper.
   g. Place watch with sweep hand near slab.
   h. Pull one-sixteenth portion of powder into liquid; spatulate, holding the blade flat against the slab for 15 seconds.
   i. Pull in rest of 16th in turn, spatulate each for 15 seconds.
   j. Pull in eighth portions one at a time. Spatulate each for 15 seconds.
   k. Pull in fourth portions one at a time. Spatulate each for 20 seconds.
   l. Spatulate mixture to a threading consistency for cementation.
   m. Spatulate mixture to a putty-like consistency when used as a protective base.
   n. Move mix to exchange zone.
   o. Clean slab and equipment.

PROCEDURE: Prepare cement as a protective base. (zinc oxide-eugenal cement)

Performance Objective

Given the necessary equipment and supplies, prepare, mix and deliver the cement. The prepared mix must be the correct consistency for use as a protective base or cementation purposes. (1)

Equipment and Supplies

1. Zinc-oxide eugenal cement
2. Manufacturer's instructions

Performance Guide

1. Know care of the slab and instruments used in preparation of the cement.
2. Mix the cement.
   a. Assemble supplies and equipment.
   b. Ascertain type of liquid to be mixed with zinc-eugenal.
   c. Place desired amount of powder on slab.
   d. Place 2 drops of desired solution near one end of mixing slab.
   e. Mix half powder, spatulating rapidly and well.
   f. Add small portions mixing thoroughly.
   g. Remove excess oil by blotting.
   h. Move mix to exchange zone (mix should have a putty-like consistency.
   i. Clean slab and instrument immediately.

PROCEDURE: Prepare impression materials

PERFORMANCE OBJECTIVE

Given the necessary equipment and supplies, prepare the alginate for taking impressions of the maxillary and mandibular arch. All steps in the instructor's checklist must be acceptably completed. (1)

Equipment and Supplies

1. Trays
2. Alginate impression material
3. Water
4. Spatula

Performance Guide

1. Select trays for mandibular and maxillary arch.
2. Prepare alginate impression material, using ratio of powder/water according to manufacturers instructions.
   a. Test temperature of water. Cool to 72° if necessary.
   b. Measure water according to the exact amount needed to fill tray for:
      (1) maxillary arch
      (2) mandibular arch
   c. Agitate powder.
   d. Measure powder according to amount needed for:
      (1) maxillary arch
      (2) mandibular arch
   e. Using spatula, fold powder into water until it is well moistened.
   f. Mix until a smooth homogenous mixture has been achieved.
3. Fill trays one at a time.
   a. Slightly overfill tray.
   b. Have excess material ready for operatory if needed.
4. Clean up operatory and laboratory equipment.

INSTRUCTOR CHECKLIST: Prepare impression materials (alginate)

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Assembled materials		
2. Cooled water (if necessary)		
3. Measured water according to the exact amount needed for each tray		
4. Agitated alginate powder		
5. Measured alginate powder according to amount needed for each tray		
6. Folded powder into water		
7. Mixed alginate until smooth		
8. Filled tray one at a time		
9. Handed tray to dentist		
10. Cleaned up		

*All steps must be rated acceptable.

PROCEDURE: Assist with taking impressions

Performance Objective

Given a patient, assist the dentist in taking the impression of the mandibular and maxillary arches. All items on the instructor's checklist must be acceptably completed. (1)

Safety Factors

Label impression properly and make sure that the model is poured in a reasonable length of time.

Equipment and Supplies

1. Tray
2. Alginate material
3. Damp Towel

Performance Guide

1. Assist dentist with preliminary oral examination.
2. Hand tray to dentist for try-in and final selection.
3. Prepare and mix alginate material.
4. Fill maxillary tray and deliver to dentist.
5. After tray is placed by dentist, stabilize the tray for 8-10 minutes.
6. Receive tray from dentist and wrap in damp towel.
7. Fill mandibular tray and deliver to dentist.
8. After tray is placed by dentist, stabilize tray for 8-10 minutes.
9. Receive mandibular tray and wrap in damp towel.
10. Care for patient.
11. Dismiss patient, and reappoint for second sitting.
12. Record treatment.
13. Clean operatory and prepare for next patient.
14. Deliver preliminary impression to laboratory.
15. If impression is to be sent out:
    a. Record dictated lab work order for dentist signature.
    b. Box impression and enclose work order.
    c. Send impression to designated lab.

INSTRUCTOR CHECKLIST: Assist with taking impressions

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Handed tray to student		
2. Prepared alginate material		
3. Filled maxillary tray and delivered to dentist		
4. Stabilized tray		
5. Wrapped tray in damp towel		
6. Filled mandibular tray and delivered to dentist		
7. Stabilized tray		
8. Wrapped tray in damp towel		
9. Dismissed patient		
10. Recorded treatment		
11. Cleaned operatory		
12. Delivered impression to laboratory		

*All steps must be rated acceptable.

PROCEDURE: Stabilize and remove impressions

Performance Objective

Given a typodont with impression tray in place, stabilize and remove the impression. The tray must be well stabilized for five to eight minutes and removed without distorting the impression material. (1)

Equipment and Supplies

1. Mandibular tray
2. Maxillary tray

Performance Guide

1. Note time tray is inserted.
2. Stabilize mandibular tray.
   a. Apply equal bilateral pressure firmly holding the middle fingers over the bicuspid regions and using the thumbs to support the mandible.
   b. Observe setting time.
3. Remove impression.
   a. Hold tray with right thumb and fingers.
   b. Retract right cheek and lip with left fingers.
   c. Release the edge of the impression by depressing the buccal mucosa.
   d. Remove impression with sudden jerk or snap.
4. Stabilize maxillary tray.
   a. Apply equal pressure on each side of tray.
   b. Observe setting time.

PROCEDURE: Prepare set-up for prosthetics (fixed)

Performance Objective

Given the necessary aramentarium, prepare and set-up for the type of fixed prosthesis indicated in the treatment plan given by the instructor. When completed all items must be available and arranged in the correct manner and order of use. (1)

Equipment and Supplies

1. Type of fixed prosthetics
2. Local anesthetic
3. Basic instrument set-up
4. Impression materials

Performance Guide

1. Identify type of fixed prosthetics crown or bridge.
2. Verify stage of procedure - first, second, or third appointment.
3. Review treatment plan with doctor.
4. Wash hands.
5. Prepare local anesthetic set-up.
6. Assemble basic instrument set-up and arrange on tray.
7. Assemble impression materials and trays, and arrange in appropriate area near chair.
8. Identify and assemble all other materials and equipment necessary to the procedure being performed.
9. Make final check of set-up.

PROCEDURE: Prepare set-up for prosthetics (removal)

Performance Objective

Given a treatment plan for a removable prosthesis, and the necessary aramentarium, set-up the opertory for the treatment. Upon inspection all items necessary to complete the procedure must be available and arranged in the correct order on a tray and in area near the dental chair. (1)

Equipment and Supplies

1. Heater
2. Impressions materials
3. Trays
4. Dental instruments

Performance Guide

1. Determine type of removal prosthesis, partial or full dentures.
2. Verify stage or procedure - first, second, etc., appointment.
3. Confer with doctor regarding his plans.
4. Activate heater, if necessary: (a) compound heater, (b) hydrocolloid oven.
5. Place impression material in heater, if necessary.
6. Assemble impression materials and mixing supplies and place in appropriate place.
7. Assemble a selection of impression trays and place in appropriate area.
8. Select a basic set of instruments and materials and arrange on treatment tray.
9. Make final check to determine set-up is complete.

PROCEDURE: Give new denture instructions

Performance Objective

Given a patient who has received new dentures, explain adjustment period and instruct the patient in the wear and care of the dentures according to dentist's predetermined plan of instruction.

Performance Guide

1. Describe difference in feel of natural teeth and dentures.
2. Explain period of adjustments.
3. Explain dietary restrictions and for how long.
4. Explain rate of secretion of saliva, and when it will return to normal.
5. Suggest ways of handling speech problems.
6. Explain proper method for cleaning the dentures. Demonstrate techniques.
7. Demonstrate insertion and removal of dentures.
8. Explain care of dentures if left out of mouth at night.
9. Explain possibility of sore spots developing. Stress need to call dentist.
10. Explain need for continued dental check-ups.

PROCEDURE: Preserve and mail biopsy specimen

Performance Objective

Given a biopsy specimen, and the necessary supplies and equipment, place the specimen in the specified solution and mail to designated laboratory. All steps in the instructor's checklist must be completed with a satisfactory rating. (1)

Safety Factors

1. Specimen should be placed in properly labeled specimen container immediately to prevent mix up or discarding.

Equipment and Supplies

1. Specimen
2. Container
3. Ten percent formalin solution
4. Label for bottle

Performance Guide

1. Receive dentist's order to preserve specimen.
2. Prepare 10 percent formalin solution and fill specimen bottle 3/4 full. Place tissue in solution and seal bottle.
3. Prepare label and attach to bottle. Include:
   a. name of patient
   b. name of dentist
   c. type of tissue (or other type of specimen)
   d. date
   e. location of area biopsy was taken from
   f. duration of the condition
   g. doctor's tentative diagnosis
   h. instructions for type of examination
4. Place prepared specimen in mailing container.
5. Address container and affix correct amount of postage.
6. Mail specimen to laboratory as designated by dentist.
7. Record in patient's folder:
   a. procedure
   b. mailing date
   c. laboratory specimen was sent to
   d. a copy of the laboratory orders

INSTRUCTOR CHECKLIST: Preserve and mail biopsy specimen

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Received instructions to preserve specimen		
2. Prepared specimen bottle		
3. Placed specimen in bottle and sealed container		
4. Prepared label and affixed to bottle. Included instructions for lab		
5. Prepared specimen container for mailing		
6. Mailed specimen to laboratory		
7. Recorded information in patient's record		

*All steps must be rated acceptable.

PROCEDURE: Assist in administering first aid

Performance Objective

Given a model and necessary supplies, demonstrate the emergency procedure for reviving a patient who has fainted. All items on the instructor's checklist must be acceptably completed. (1)

Safety Factors

Dental assistant administers first aid only when dentist is not available.

Equipment and Supplies

1. Cold damp towel.
2. Spirits of ammonia.

Performance Guide

1. Identify location and use of emergency drugs.
2. Name signs and symptoms of fainting:
   a. pale gray face
   b. weakness, giddiness, dizziness, and faintness
   c. profuse cold perspiration
   d. rapid pulse
   e. shallow breathing
   f. loss of consciousness
3. Place patient in recumbent position with head lower than feet.
4. Summon help.
5. Loosen patient's clothing around neck.
6. Place cold damp towel on forehead.
7. Have patient inhale aromatic spirits of ammonia.
8. Observe patient's reactions.
9. When patient revives, keep in supine position for 10 minutes to prevent nausea and dizziness.
10. Record event on patient's treatment record.

INSTRUCTOR CHECKLIST: Assist in administering first aid (fainting)

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Recognized signs and symtoms that patient was beginning to faint		
2. Placed patient in recumbent position with head lower than feet		
3. Summoned help		
4. Loosened patient's clothing around neck (if necessary)		
5. Placed cold damp towel on forehead		
6. Had patient inhale aromatic spirits of ammonia		
7. Observed patient's reactions		
8. Kept patient in supine position (when revived)		
9. Recorded event on patient's treatment record		

*All steps must be rated acceptable.

PROCEDURE: Dismissing the patient

Performance Objective

Given a student-patient with treatment procedure completed, demonstrate the correct technique for dismissing a patient from the chair. All steps in the instructor's checklist must be checked acceptable. (1)

Equipment and Supplies

1. Towel

Performance Guide

1. Remove saliva ejector from mouth.
2. Wipe patient's face.
3. Raise back rest to upright position and lift arm on chair.
4. Assist patient to rinse mouth.
5. Remove bib or drape.
6. Move bracket table and other objects out of the way.
7. Return personal items to patient.
8. Assist patient in rising from the chair.
9. Escort patient to receptionist's desk.
10. Reschedule appointment, if necessary.
11. Prepare and give patient receipt for payment of fees (if paid).

INSTRUCTOR CHECKLIST: Dismissing the patient

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Removed saliva ejector		
2. Wiped patient's face		
3. Raised back rest to upright position and lifted arm on chair		
4. Assisted patient to rinse mouth		
5. Removed bib or drape		
6. Moved bracket table and other objects out of the way		
7. Returned personal items to patient		
8. Assisted patient in rising from chair		
9. Escorted patient to receptionist's desk		
10. Rescheduled appointment, if necessary		
11. Prepared and gave patient receipt for payment of fees (if paid)		

*All steps must be rated acceptable.

PROCEDURE: Practice patient and operatory safety measures for X-radiation.

Performance Objective

Given a patient and a dental X-ray unit, demonstrate the safety measures for X-radiation as explained by governmental radiation safety standards. (13)

Safety Factors

Follow all safety standards as required by governmental control.

Performance Guide

1. Identify specific hazards related to radiation.
2. Identify symptoms and complications of over exposure to radiation.
3. Demonstrate patient safety.
   a. Question patient and determine date last X-ray was taken.
   b. If patient has had X-ray within the preceeding 30 days, consult with dentist.
   c. Use lead apron to cover patient.
   d. Use 16" lead lined cone when exposing patient.
   e. Maintain careful record of total exposure of patient.
   f. Eliminate any unnecessary use of X-ray.
4. Demonstrate dental personnel safety.
   a. Wear film badge or ionization meter.
   b. Use fastest available film.
   c. Use protective barriers (lead) between personnel and patient.
   d. Use cord at least 6 feet in length for controls.
   e. Keep hands off of tube or pointer cone during filming.
   f. Stand at least 6 feet from patient in proper area of the room.
   g. Check X-ray tube for proper shielding to avoid stray radiation.
   h. Comply with state requirements on the students exposure to X-ray.

PROCEDURE: Clean X-ray processing equipment and prepare developing solutions.

Performance Objective

Given the necessary equipment and supplies, clean the tanks and fill them with fresh solution. (1)

Safety Factors

1. Safety glasses and protective apron should be worn.
2. When mixing solution read the label three times so as not to mix developer and fixer.
3. Developer and fixer tanks should be labeled.

Equipment and Supplies

1. X-ray processing equipment
2. Developer
3. Fixer chemicals

Performance Guide

1. Identify purpose for routinely discarding solutions and cleaning the processing tanks.
2. Assemble cleaning supplies and developer and fixer chemicals.
3. Drain tanks.
4. Scrub tanks.
5. Mix developer and fixer as recommended by manufacturer.
6. Cover tanks and let stand for 24 hours.
7. Record date on cleaning record.
8. Clean hangers.
9. Put supplies and other materials away.
10. Leave dark room neat and tidy.

INSTRUCTOR CHECKLIST: Clean X-ray processing equipment.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Assembled cleaning supplies and developer and fixer chemicals.		
2. Drained tanks.		
3. Scrubbed tanks.		
4. Filled developer tank with distilled water. Added developer chemical and stirred. Covered tank - Prepare developer.		
5. Filled fixer tank with distilled water. Added fixer chemical and stirred. Prepared developer.		
6. Covered tanks.		
7. Recorded date on cleaning record.		
8. Cleaned hangers.		
9. Put supplies and other materials away.		
10. Left the dark room neat and tidy.		

*All steps must be rated acceptable.

PROCEDURE: Adjust voltage, amperage, and timer on X-ray machine.

Performance Objective

Given dental X-ray unit, demonstrate the technique of adjusting the voltage, amperage, and timer to obtain the correct flow, speed, and wave length when exposing radiographic films. (1)

Safety Factors

Review safety regulations written by the Pennsylvania Department of Environmental Resources, Division of Radiology.

Performance Guide

Adjust voltage, amperage, and timer

a. Turn on switch on dental X-ray unit.
b. Set millimeter setting to recommended levels.
c. Set kilovoltmeter setting to required levels.
d. Set timer for correct time.

PROCEDURE: Expose interoral radiographs using a long-cone and parallel technique.

Performance Objective

Given the necessary equipment and supplies, take X-rays of the patient's teeth in the maxillary and mandibular regions using the paralleling technique. All steps on the instructor's checklist must be completed with a satisfactory rating. (19/23)

Safety Factors

Use all safety measures for patient and personnel.

Equipment and Supplies

1. Dental X-ray unit
2. Long cone
3. Radiographic accessories
4. Film

Performance Guide

1. Seat and prepare patient.
2. Receive instructions for taking a full mouth survey.
3. Select and assemble films and accessories.
4. Check machine for correct amperage and voltage.
5. Take X-rays of maxillary arch:
   a. Prepare films.
   b. Explain to patient what is to be done.
   c. Position film in the four maxillary positions; stabilize.
   d. Instruct patient to hold film in place.
   e. Place tube parallel to film.
   f. Position self in safety zone.
   g. Set time on X-ray unit.
   h. Expose film.
   i. Remove films from patient's mouth.
6. Take X-ray of mandibular arch repeating steps a through i.
7. Care for patient and dismiss (if appropriate).
8. Record radiograph examination.
9. Take films to dark room and develop.

INSTRUCTOR CHECKLIST: Expose interoral radiographs using a long-cone and parallel technique.
(continued on next page)

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Received instructions to take full mouth survey.		
2. Selected and assembled films and accessories.		
3. Checked X-ray machine for correct amperage and voltage.		
4. Prepared films.		
5. Explained to patient what is to be done.		
6. Positioned film in each of the four maxillary positions.		
7. Instructed patient to hold film in place.		
8. Positioned tube parallel to film.		
9. Positioned self in safety zone.		
10. Set time on X-ray machine and exposed film.		
11. Removed films from patient's mouth and place in container.		
12. Positioned films in each of the four mandibular positions and took radiographs.		

*All steps must be rated acceptable.

INSTRUCTOR CHECKLIST: Expose interoral radiographs using a long-cone and parallel technique.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
13. Removed films from patient's mouth and placed in container.		
14. Cared for patient and dismissed (if appropriate).		
15. Recorded radiograph examination.		
16. Took films to dark room for developing, fixing and drying.		

*All steps must be rated acceptable.

PROCEDURE: Develop and fix exposed radiographic film.

Performance Objective

Given the necessary equipment and supplies, process the film by the time-temperature method. All items on the instructor's checklist must be acceptably completed. (1/23)

Safety Factors

Safety glasses and protective aprons must be worn.

Equipment and Supplies

1. Equipped dark room
2. Exposed radiographic film
3. Apron
4. Safety glasses

Performance Guide

1. Identify key factors related to the processing of exposed radiographic films.
   a. constant temperature of solutions
   b. freshness of the solutions
   c. time
2. Processing the film:
   a. While light is on in the dark room:
      1. Assemble supplies and materials.
      2. Write patient's name on holder.
      3. Test temperature of solutions. Make adjustments in temperature as needed.
      4. Check developing scale and determine length of time to leave films in developer solution.
      5. Stir developer.
   b. When light is turned off and "safe" light is turned on:
      1. Separate film (one at a time) from its wrappings.
      2. Place in clip and press points together to be sure film is secure.
      3. When all films are on hangers, set timer for the proper length of time.
      4. Place loaded hanger in developer solution.
      5. Remove films immediately when timer rings.
      6. Dip films in water 4-5 times.
      7. Place films in fixer solution for proper length of time.
      8. Remove films from fixing solution and water bath.
      9. Dry films.
   c. Turn off "safe" light and turn on overhead light.
   d. Clean up.

INSTRUCTOR CHECKLIST: Develop and fix exposed radiographic film.
(continued on next page)

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Transported exposed film to dark room.		
2. Checked temperature of developing solution.		
3. Selected developing time for films to be developed.		
4. Stirred developing solution.		
5. Made necessary changes in temperature of developer.		
6. Turned on "safe" light.		
7. Extinguished overhead light.		
8. Opened each film packet and placed film on hanger.		
9 Set timer for the correct number of minutes.		
10. Immersed film in developing solution.		
11. Left film in developing solution for prescribed number of minutes		
12. When timer sounded, removed film from developer and placed it in water bath.		

*All steps must be rated acceptable.

INSTRUCTOR CHECKLIST: Develop and fix exposed radiographic film.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
13. Rinsed film by dipping them up and down in water bath.		
14. Placed film in fixing solution and set timer.		
15. Left film in fixing solution twice the time they were in developer.		
16. At end of fixing time, removed film, and placed them in water bath with water running.		
17. At end of washing time, removed film from water bath and dried film.		

*All steps must be rated acceptable.

PROCEDURE: File dental radiographs.

Performance Objective

Given six sets of mounted radiographs, file the radiographs according to the established procedures. All radiographs must be filed in the proper place. (1)

Safety Factors

Be sure that X-rays are filed correctly with proper patient identification.

Performance Guide

1. Identify methods of filing:
   a. in patient's record
   b. in file drawer reserved for X-rays only
2. If filed in patient's record: check name on radiograph with name on patient's record.
3. Place mounted films in record envelope.
4. If filed in radiograph file drawer, file under the correct letter in the alphabet.

PROCEDURE: Care for preliminary or final impressions.

Performance Objective

Given a preliminary or final impression, care for the impression. No distortion must occur before the impression is poured. (24)

Performance Guide

1. Prepare preliminary impressions for delivery to office laboratory.
   a. Assemble materials.
   b. Receive impression from dentist.
   c. Wrap impression in a damp paper towel or place in humidor.
   d. Take impression to office laboratory.
   e. Pour within 30 minutes.
2. Prepare final impression for delivery to dental laboratory.
   a. Assemble boxing materials.
   b. Record dictated laboratory work order for dentist's signature.
   c. Box impression and enclose work order.
   d. Send impression to dental laboratory.

PROCEDURE: Pour, trim and articulate casts.

Performance Objective

Given the necessary equipment and supplies, pour and trim the casts. All steps on the instructor's checklist must be completed with an acceptable rating. (24)

Safety Factors

1. Wear safety glasses and protective clothing when preparing and trimming model.
2. Be careful when trimming models that fingers are not injured.

Equipment and Supplies

1. Set of edentulous impressions
2. Can of dental stone
3. Dental vibrator
4. Model trimmer
5. Plastic bowl
6. Spatula
7. Knife

Performance Guide

1. Prepare the impression for pouring.
   a. Assemble materials and equipment.
   b. Remove hydrocolloid impressions from humidor and wash with plaster-water solution.
   c. Rinse it with clear water.
   d. Place hydrocolloid impressions in fixing solution for 5-10 minutes.
   e. Remove from solution and shake or lightly blow off excess water.
   f. Prepare dental stone.
      1. Measure the required amount of dental plaster and water.
      2. Mix the material until a smooth homogeneous mix is produced.
   g. Place bowl on vibrator for 30 seconds.
   h. Pour mixture into the impression tray and place it on the vibrator.
   i. Remove from vibrator and add material until the impression is filled and borders are covered. Let set for 45 minutes.
   j. Prepare another portion of dental stone, and prepare a patty at least 1 cm. thick.
   k. Invert impression on patty. Draw material up and around borders and heels of impression and shape to desired size.
   l. Discard remainder of material, rinse and clean spatula and bowl.
   m. Allow cast to set for about 60 minutes.

Performance Guide (continued)

2. Trim cast.
   a. Separate impressions from cast.
   b. Evaluate maxillary and mandibular case.
   c. Prepare casts for trimming.
   d. Trim maxillary cast using model trimmer.
      1. Trim posterior border.
      2. Trim the sides of the cast.
      3. Trim the anterior borders.
      4. Trim the heels.
      5. Carve down the excess stone.
      6. Measure and mark with pencil all border dimensions of maxillary cast.
      7. Using model trimmer, trim down all borders to pencil lines.
      8. Inspect the cast.
      9. Draw a line across the posterior border at the minimum of 1 cm. below the roof of the palate.
      10. Trim down to base line.
   e. Trim mandibular cast.
      1. Trim side borders of cast.
      2. Trim the rounded anterior border.
      3. Trim the heel borders.
      4. Carve down excess stone which is adjacent to the peripheral roll.
      5. Measure and mark all border dimensions of the mandibular cast.
      6. Use model trimmer and trim down all borders except the posterior.
      7. Inspect cast for symmetrical appearance.
      8. Use plaster knife and carve down any excess stone.
      9. Occlude the mandibular cast with the maxillary cast.
      10. Place occluded casts on model trimmer and trim posterior border of the mandibular cast.
      11. Draw a line across the posterior border a minimum of 1 cm. below the floor of the mouth.
      12. Trim down the base of the line.
      13. Deliver completed casts to dentist.
   f. Clean up and care for equipment.

INSTRUCTOR CHECKLIST: Pour, trim and articulate casts.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Assembled materials.		
2. Prepared impression for pouring.		
3. Prepared mix.		
4. Poured mixture into impression.		
5. Checked for bubbles in cast.		
6. Checked for anatomical details reproduced.		
7. Prepared cast for trimming.		
8. Trimmed cast a. Created a 2-3 mm. edge b. Trimmed sides, heels, borders and posterior borders.		
9. Occluded casts and made adjustments.		
10. Checked casts for proper dimensions.		
11. Checked for nicks and cuts.		

*All steps must be rated acceptable.

PROCEDURE: Pour, trim and articulate casts.

Performance Objective

Given the necessary equipment and supplies, articulate the casts, completing each step in the instructor's checklist with an acceptable rating. (24)

Equipment and Supplies

1. Mandibular and maxillary casts
2. Articulator
3. Dental stone

Performance Guide

1. Assemble materials.
2. Select proper size articulator.
3. Score the base of each model and widen grooves with a laboratory knife.
4. Seal the two models with sticky wax to hold them in occlusion.
5. Prepare dental plaster and place a mound on the glass slab and then insert the lower flange of the articulator in it.
6. Place the base of the lower model on the articulator and plaster.
7. Adjust the model so that it is level. Smooth sides, remove excess plaster and allow remainder to harden.
8. Lower the top flange of the articulator into place over the grooves of the upper model.
9. Prepare another mix of dental plaster.
10. Carefully apply to mix on top of model.
11. Wet hands and smooth the plaster model, then allow it to harden.
12. Clean up laboratory.

INSTRUCTOR CHECKLIST: Pour, trim and articulate casts.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Assembled materials and selected proper size articulator.		
2. Scored the base of each model and widened the grooves.		
3. Sealed the two models to hold them in occlusion.		
4. Inserted lower flange of articulator into a mound of dental plaster.		
5. Placed the base of lower model on the articulator and plaster.		
6. Performed adjustments and removed excess wax.		
7. Lowered top flange of articulator into place over the grooves of the upper model.		
8. Prepared another mix of dental plaster.		
9. Applied mix on top of model.		
10. Wet hands and smoothed the plaster, and set it aside to harden.		
11. Cleaned up laboratory.		

*All steps must be rated acceptable.

PROCEDURE: Inspect dental laboratory equipment for proper use and maintenance.

Performance Objective

Given an assortment of dental laboratory equipment, inspect each item and perform the necessary maintenance, according to manufacturer's directions, or prepare requisition for repair or replacement. Each piece of equipment must be acceptable for use or set aside for repair or replacement. (1)

Performance Guide

1. Assemble manufacturer's directions for using and maintaining equipment.
2. Identify purpose and use of each type of equipment.
3. Examine each piece for accumulation of debris. Clean as needed.
4. Inspect electrical connections including cords.
5. Test operation of each piece of equipment.
6. Oil equipment if necessary.
7. Check stability of items anchored on bench. Tighten connections if necessary.
8. Prepare requisition (if piece of equipment is defective).
9. Send defective equipment to proper place for repair.

PROCEDURE: Maintain dental laboratory instruments.

Performance Objective

Given an assortment of dental laboratory instruments, inspect, clean, oil if necessary, and store them in the area designated by the instructor. All instruments must be ready for immediate use and stored in the proper place. (1/19)

Performance Guide

1. Identify special problems related to care and maintenance of dental laboratory instruments.
2. Identify methods for removing wax and plaster from instruments and mixing bowls.
3. Identify methods for cleaning and sterilizing impression trays.
4. Inspect instruments for proper use.
5. Separate defective instruments from usable items.
6. Replace defective items (or report defects to dentist and follow established procedures.)
7. Clean instruments.
8. Sterilize instruments as required.
9. Store items in designated areas in storage cabinets.

PROCEDURE: Maintain dental operatory equipment.

Performance Objective

Given dental operatory equipment, prepare a written plan for the daily, weekly, monthly, and semi-annual care and maintenance of the equipment. The completed plan must follow the procedure established by the instructor. (1/19)

Performance Guide

A. Daily Care:
   1. Assemble cleaning equipment.
   2. Wipe dust and dirt from engine and cord arm pulleys.
   3. Inspect water and air syringe for leaks.
   4. Remove wax accumulations from wax burner.
   5. Clean and polish metal parts of cuspidor and other metal parts of the unit.
   6. Flush saliva ejector.
   7. Turn off main water, air, and gas valves on unit.
   8. Loosen tension on engine belts.

B. Weekly Care:
   1. Remove and clean saliva ejector screen.
   2. Clean inside surface of operating light lens.
   3. Wash engine belt.
   4. Wash spray bottle or reservoirs and refill.

C. Monthly Care:
   1. Inspect brushes on dental engine.
   2. Lubricate dental engine.
   3. Lubricate pulleys on engine arm and wrist joint.
   4. Change cotton on air syringe filter.

D. Semi-annual Care:
   1. Wax chrome plated surfaces of unit.
   2. Clean water supply screen.
   3. Turn electrical current off.
   4. Open control box.
   5. Check contact brushes for wear.
   6. Lubricate foot rheostate electrical contacts using petroleum jelly.
   7. Call dental service repairmen, if necessary.

PROCEDURE: Clean dental laboratory instruments.

Performance Objective

Given the necessary equipment and supplies, wash and dry the instruments. Upon inspection, each instrument must be free of all traces of plaster, wax, and any other type of debris. (1)

Equipment and Supplies

1. Soiled dental instruments
2. Cleaning solvents

Performance Guide

1. Assemble cleaning supplies.
2. Assemble and sort instruments for cleaning.
3. Wash wax carvers, utility knives, spatulas with solvents to remove wax and traces of gypsum products.
4. Clean burs with scratch brush.
5. Wash, dry and apply vaseline to metal impression trays.
6. Clean handpiece on bench engine.

PROCEDURE: Clean dental lathe.

Performance Objective

Given the necessary equipment and supplies, clean the lathe. When cleaning is completed the lathe must be ready for use with all parts clean and replaced. (1)

Equipment and Supplies

1. Dental lathe
2. Dental engine oil
3. Manufacturer's instruction

Performance Guide

1. Identify types of dental lathes.
2. Identify purpose and use of a dental lathe.
3. Identify parts of a dental lathe.
4. Clean the lathe.
   a. Assemble cleaning supplies.
   b. Remove pumice from splash pan and replace with new pumice.
   c. Remove rag wheel, clean, disinfect, dry and replace.
   d. Remove protective shield, clean, disinfect, and replace.
   e. Oil joints as needed.
5. Clean the table area around the lathe.

PROCEDURE: Clean dental operatory equipment. (handpieces)

Performance Objective

Given the necessary equipment and supplies, clean the handpieces. The manufacturer's directions for cleaning must be followed precisely and all steps on the instructor's checklist acceptably completed. (1)

Equipment and Supplies

1. Dental handpieces
2. Manufacturer's directions
3. Pipe cleaners
4. Dental oil
5. Cleaning solutions

Performance Guide

1. Identify parts of each type of handpiece.
2. Read manufacturer's directions for care of handpieces.
3. Assemble cleaning supplies.
4. Clean sheath.
5. Clean chuck.
6. Lubricate handpiece.

INSTRUCTOR CHECKLIST: Clean dental operatory equipment.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Read manufacturer's directions.		
2. Assembled cleaning supplies.		
3. Cleaned outside of sheaths.		
4. Cleaned chucks.		
5. Lubricated as necessary.		
6. Drained air compressors.		

*All steps must be rated acceptable.

PROCEDURE: Clean dental operatory equipment (entire unit).

Performance Objective

Given the necessary equipment and supplies, clean and disinfect the operatory. All steps on the instructor's checklist must be acceptably completed. (1)

Equipment and Supplies

1. Dental unit
2. Cleaning and disinfecting armamentarium

Performance Guide

1. Assemble cleaning and disinfecting armamentarium.
2. Inspect room for gross debris, remove and discard.
3. Lower backrest of chair. Spray disinfectant over chair, and wipe starting at the headrest and ending at the footrest.
4. Raise backrest and chair. Wipe base if necessary.
5. Spray disinfectant over unit and onto paper towel.
6. Wipe each unit component including cords and enclosure.
7. Spray disinfectant onto towel and wipe operator's and assistant's chair.
8. Spray disinfectant over wall cabinets; wipe same, any components above cabinets, operating lights, X-ray tubes, towel and paper cup holder.
9. Spray disinfectant over sink area including levers and wipe.
10. Use sterile gauze sponges saturated with germicidal solution and wipe all small components of the treatment which may be a source of contamination: handpieces, aspirator, saliva ejector cuspidor, air and water syringe.
11. Inspect carefully for cleanliness.

INSTRUCTOR CHECKLIST: Clean dental operatory equipment.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Assembled cleaning and disinfecting armamentarium.		
2. Inspected room for gross debris, removed and discarded.		
3. Lowered backrest of chair and sprayed with disinfectant.		
4. Raised backrest and chair, and wiped base if necessary.		
5. Sprayed disinfectant over unit and onto paper towel.		
6. Wiped each unit component.		
7. Wiped operator's and assistant's chair with disinfectant.		
8. Sprayed disinfectant over wall cabinets, operating lights, X-ray tubes, towel and paper cup holder.		
9. Sprayed and wiped disinfectant over sink area.		
10. Used germicidal solution to wipe all small components of the treatment.		
11. Inspected carefully for cleanliness.		

*All steps must be rated acceptable.

PROCEDURE: Clean laboratory bench engine.

Performance Objective

Given a laboratory bench engine, manufacturer's manual and the necessary equipment, clean the equipment following the manufacturer's instructions precisely. When completed, the engine must be clean, oiled, belt in satisfactory condition, and engine stabilized to table. (12)

Equipment and Supplies

1. Laboratory Bench engine
2. Manufacturer's manual

Performance Guide

1. Assemble cleaning materials.
2. Clean and oil handpiece.
3. Check condition of engine belt. Change if necessary.
4. Clean table area around equipment.
5. Check stability of attachment to table. Tighten anchor screws as needed.

PROCEDURE: Clean model trimmer.

Performance Objective

Given the necessary equipment and supplies, clean, inspect, and reverse the grinding wheel as needed. All steps in the instructor's checklist must be acceptably completed. (12)

Safety Factors

1. Make sure fingers are away from the rotating wheel.
2. Safety glasses and protective clothing should be worn.

Equipment and Supplies

1. Model trimmer
2. Manufacturer's instructions
3. Cleaning supplies

Performance Guide

1. Identify purpose and use of a model trimmer.
2. Identify part of the equipment.
3. Clean the equipment
   a. Remove back plate
   b. Empty accumulated plaster
   c. Wash back plate and replace
   d. Remove hose
   e. Run brush through outlet
   f. Examine the condition of the grinding wheel
   g. Clean grinding wheel by using a plate brush while wheel and water are running
   h. If necessary reverse the grinding wheel:
      1. unscrew bolts and remove wheel housing
      2. remove nut holding stone to backing plate
      3. reverse stone
      4. replace housing bolts and tighten
4. Check equipment to ascertain that all parts are clean and properly reassembled.

INSTRUCTOR CHECKLIST: Clean model trimmer.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Removed back plate.		
2. Discarded accumulated plastics.		
3. Washed, dried and replaced back plate.		
4. Removed hose and ran brush through outlet.		
5. Examined grinding wheel for wear.		
6. Reversed wheel, if necessary.		

*All steps must be rated acceptable.

PROCEDURE: Clean and maintain dental instruments.

Performance Objective

Given the necessary equipment and supplies, clean the instruments. Upon visual inspection the instruments must be free of all debris and ready for sterilization. (1)

Equipment and Supplies

1. Dental operatory instruments
2. Cleaning supplies

Performance Guide

1. Identify safety factors related to washing and cleaning instruments.
2. Identify methods for cleaning instruments:
   a. Manual method
   b. Scrub technique
   c. Ultrasonic cleaning
3. Manual cleaning:
   a. Rinse instruments in tepid water to remove blood and debris.
   b. Place instruments in detergent.
   c. Dismantle instruments with detachable parts.
   d. Open instruments with joints.
   e. Scrub instruments with stiff brush.
   f. Apply individual measures for problem areas:
      1. Give special attention to instruments with grooves and joints.
      2. Use pipe cleaner dipped in detergent through opening in saliva ejector and other instruments with lumens.
   g. Rinse thoroughly to remove all traces of detergent.
   h. Dry thoroughly.
4. Ultrasonic cleaning:
   a. Prepare ultrasonic equipment for use.
   b. Add chemical cleansing solution.
   c. Place instrument in carrier tray or basket and submerge in solution.
   d. Close ultrasonic cleanser and set timer (consult manufacturer's chart).
   e. When cycle is complete, lift carrier, drain instruments and dry thoroughly.

PROCEDURE: Prepare instruments for sterilization.

Performance Objective

Given clean dental instruments and wrapping materials, prepare the instruments for sterilization by dry or moist heat methods. Each instrument must be free from all blood, saliva, exudate, soap residue, dirt and correctly packaged for sterilization. (1)

Performance Guide

1. Identify factors which interfere with proper sterilization of instruments.
2. Identify reasons instruments must be thoroughly dry before wrapping and sterilization.
3. Identify safety factors related to washing and scrubbing instruments.
4. Identify types of wrapping materials and the advantage and disadvantage of each type of material.
5. Identify technique for wrapping items to be sterilized by dry or moist heat methods.
6. Identify purpose and methods for inspecting wrapping materials prior to use.
7. Prepare and clean instruments for sterilization.
8. Sort clean instruments.
9. Package instruments.
   a. Place appropriate number in each bag.
   b. Seal bag with heat sensitive tape.
   c. Date package.
10. Clean up.

PROCEDURE: Disinfect instruments using chemical disinfectant.

Performance Objective

Given the necessary equipment and supplies, prepare the instruments and disinfect them maintaining the standards for effective destruction of pathogenic organism. All items on the instructor's checklist must be acceptably completed. (1)

Equipment and Supplies

1. Soiled instruments
2. Cleaning supplies
3. Covered pan
4. Disinfectant solution

Performance Guide

1. Identify federal regulations regarding the use of chemical disinfectants, and the terms "sterile" as the end results of a chemical action by a germicide.
2. Identify specific types of microorganisms that cannot be destroyed by chemical disinfectants.
3. Identify advantages and disadvantages of various types of chemical disinfectants.
4. Identify uses for chemical disinfectants:
   a. Instruments and other items that cannot be sterilized by dry or moist heat methods.
   b. Sanitization of immovable attachments contacted during an appointment.
   c. Storage of transfer forceps.
   d. Disinfectant of dental appliances prior to insertion into patient's mouth.
5. Identify principles of chemical disinfectants actions.
6. Identify safety factors related to the use of chemical disinfectants.
7. Prepare instruments for disinfection.
   a. Wash thoroughly and dry.
   b. Dismantle or open jointed instruments.
   c. Inspect instruments to ascertain that each item is clean and free of all debris or rust.
8. Place instruments in disinfectant solution.
   a. Immerse completely so that solution contacts all parts of instrument.
   b. Leave instruments in solution for 30 minutes.
9. Remove instruments.
   a. Use pick-up forceps to remove instruments.
   b. Let forceps drain and dry with sterile towel.
   c. Rinse forceps with sterile water (if solution is irritating to tissues).

INSTRUCTOR CHECKLIST: Disinfect instruments using chemical disinfectant.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Assembled materials.		
2. Prepared disinfectant solution and equipment.		
3. Inspected and prepared instruments.		
4. Submerged instrument in solution.		
5. Arranged each item so all surfaces were in contact with the solution.		
6. Removed instruments after 30 minutes.		
7. Rinsed instruments and placed on sterile tray (if appropriate).		
8. Cleaned up.		

*All steps must be rated acceptable.

PROCEDURE: Sterilize instruments in a dry heat sterilizer.

Performance Objective

Given the necessary equipment and supplies, demonstrate the correct procedure for loading and operating the sterilizer to achieve sterilization. All steps in the instructor's checklist must be acceptably completed. (18)

Equipment and Supplies

1. Dry heat sterilizer
2. Supplies and instruments to be sterilized

Performance Guide

1. Read manufacturer's directions for operating dry heat sterilizer.
2. Preheat sterilizer.
3. Set controls.
4. Arrange items in perforated tray.
5. Allow sufficient space between each item for circulation of hot air through and around each one.
6. Set timer gauge for recommended time period.
7. When cycle is complete:
   a. remove items from sterilizer.
   b. cool items.
   c. store items in sterile storage area.

INSTRUCTOR CHECKLIST: Sterilize instruments in a dry heat sterilizer.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Read manufacturer's directions for operating dry heat sterilizer.		
2. Preheated sterilizer.		
3. Set controls.		
4. Arranged items in perforated tray.		
5. Allowed sufficient space between each item for circulation of hot air through and around each other.		
6. Set timer gauge for recommended time period.		
7. When cycle was completed:		
a. removed items from sterilizer		
b. cooled items		
c. stored items in sterile storage area		

*All steps must be rated acceptable.

PROCEDURE: Autoclave

Performance Objective

Given the necessary equipment and supplies, sterilize items. Each step in the instructor's checklist is to be completed satisfactorily. (18)

Safety Factors

Make sure sterilizer has completed process before attempting to open door.

Equipment and Supplies

1. Water autoclave
2. Instruments
3. Cotton sponges
4. Other dental supplies

Performance Guide

1. Identify purpose and use of steam as a sterilization agent.
2. Identify advantages and disadvantages of steam.
3. Identify types of dental instruments and supplies that can and cannot be sterilized by steam under pressure method.
4. Identify methods of controls.
5. Identify methods for loading sterilizer and reasons.
6. Prepare instruments and supplies for sterilization.
   a. Wash and scrub instruments thoroughly.
   b. Dry instruments.
   c. Package instruments and supplies.
   d. Seal packages with heat sensitive tape.
7. Load and operate the sterilizer.
   a. Place and arrange packages on sterilizer trays.
   b. Place loaded trays into autoclave.
   c. Turn dial on sterilizer to "fill" position to allow distilled water to flow from storage tank to sterilizing chamber.
   d. Turn dial to "sterilize" to stop the flow of water, and start the sterilizing process.
   e. Close chamber door and lock.
   f. Allow temperature gauge to reach 121° C. and the pressure gauge to reach 15 pounds pressure.
   g. Set timer for the recommended time for materials being sterilized.

INSTRUCTOR CHECKLIST: Operate alcohol and water autoclave.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Prepared instruments for sterilization a. washed and dried instruments b. wrapped instruments		
2. Prepared sterilizer.		
3. Placed loaded tray into sterilizer.		
4. Closed and locked chamber door.		
5. Turned dial to sterilize.		
6. Began timing when temperature gauge reached 121° C. and pressure gauge 15 pounds.		
7. Set timer for the recommended time for material being sterilized.		
8. At end of sterilization cycle: a. turned dial to vent and allowed pressure to escape b. opened door when gauge read 0 c. dried packages		
9. Removed packages from sterilizer.		
10. Checked for change in sterilization tape and condition of packages.		
11. Removed packages from sterilization and stored in sterile storage area.		

*All steps must be rated acceptable.

SECTION V - MEDICAL ASSISTANT

Medical assistants are individuals prepared to assist licensed physicians in their overall office practice. In addition to assisting with physical examinations and performing simple laboratory and X-ray procedures, the medical assistant may make appointments, complete insurance forms, collect fees, type business letters and assist in keeping medical records. Medical assistants work under the supervision of licensed physicians.

The following procedures are relevant to the medical assistant phase of the Health Assistant Curriculum.

PROCEDURE: Measure and record temperature.

Performance Objective

Given the necessary equipment and supplies, take and record temperature. (2/3)

Safety Factors

1. Correct type of thermometer must be used.
2. Thermometer must remain in place for the prescribed length of time.
3. Temperature must be read and reported to the nearest 2/10 of a degree F and 1/10 of a degree C as noted by instructor.
4. Check thermometer carefully before insertion and after removal to make sure that they have not been broken.

Equipment and Supplies

1. Thermometer
2. Tissues
3. Lubricant if necessary

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure to patient.
4. Select appropriate thermometer.
5. Prepare thermometer for use:
   a. Glass thermometer:
      1. Shake thermometer down if mercury is above 96° F or 35° C.
      2. Wipe thermometer.
   b. Electric thermometer:
      1. Assemble monitoring kit.
      2. Place clean cover on probe.
      3. Push "on" button on to warm machine.
6. Take temperature in prescribed manner.
   a. Oral method: (make sure patient has not had any hot or cold liquids or has been smoking within 10 minutes).
      1. Insert thermometer under patient's tongue.
      2. Leave thermometer in place for 3 to 5 minutes (glass thermometer); 10 to 20 seconds (electric thermometer).
   b. Rectal method:
      1. Provide for patient privacy.
      2. Position patient.
      3. Lubricate thermometer.
      4. Insert thermometer 1 1/2 inches into rectum and hold in place at least 3 minutes (glass thermometer); 10 to 20 seconds (electric thermometer).

Performance Guide (continued)

c. Axillary method:
   1. Wipe axillary area dry before placing thermometer.
   2. Place thermometer in patient's axilla; place arm across patient's chest.
   3. Leave thermometer in place for 10 minutes.

7. Remove thermometer, remove lubricant if applicable.
8. Read thermometer and record, indicating method.
9. Clean and store thermometer (dispose plastic sheath of electric thermometer).
10. Report findings.

PROCEDURE: Measure and record pulse (radial, temporal, femoral, carotid, pedal).

Performance Objective

Given the necessary equipment and supplies, measure and record the pulse rate (radial, temporal, femoral, carotid, and pedal as designated by your instructor) of a patient. Your count must be accurate within plus or minus 2 of that found by the instructor and the force and rhythm reported must agree with instructor's findings. (2/3)

Equipment and Supplies

1. Watch with a second hand
2. Note pad
3. Pen

Performance Guide

1. Wash hands.
2. Assemble equipment and supplies:
   a. watch with second hand.
   b. note pad.
   c. pencil or pen.
3. Identify patient.
4. Explain procedure.
5. Place 3 middle fingertips over appropriate artery.
6. Count pulsations for specified period (60 seconds if inexperienced or if patient has slow, irregular pulse or heart disease, 30 seconds x 2 when student becomes comfortable with procedure) noting regularity and strength of beats.
7. Observe the force and rhythm of the beats.
8. Record pulse rate and report any unusual characteristics.

PROCEDURE: Measure and record respiration.

Performance Objective

Given the necessary equipment and supplies, record and measure the respiratory rate of a patient. The rate must be plus or minus 2 of that found by the instructor and rhythm and depth must agree with instructor's findings. (2/3)

Equipment and Supplies

1. Watch with a second hand
2. Note pad
3. Pencil

Performance Guide

1. Assemble necessary equipment and supplies:
   a. watch with second hand.
   b. note pad.
   c. pencil.
2. Identify patient.
3. Place patient in a position where respiration can be easily observed or cross arm across patient's chest where respiration can be easily felt (as if taking pulse).
4. Observe rhythm, rate, and depth of respiration (without patient being aware of procedure). Count for 30 seconds.
5. Record rate (30 x 2).

PROCEDURE: Measure and record blood pressure.

Performance Objective

Given the necessary equipment and supplies, record the blood pressure of a patient. Both the systolic and diastolic readings must be within plus or minus four points of that found by the instructor. (2/3)

Safety Factors

Do not keep pressure cuff inflated too long.

Equipment and Supplies

1. Stethoscope
2. Sphygmomanometer
3. Note pad
4. Pencil

Performance Guide

1. Wash hands.
2. Identify patient.
3. Explain procedure.
4. Assemble supplies and equipment, making sure cuff is of proper size.
5. Clean ear pieces and diaphragm of stethoscope with antiseptic.
6. Position equipment and patient.
7. Wrap blood pressure cuff around patient's arm with edge of cuff about two inches above the elbow, securing firmly. Sphygmomanometer should be level with patient's chest and at assistant's eye level.
8. Attach tubes to blood pressure cuff.
9. Feel for pulsations of brachial artery with fingertips positioned over inner aspect of the antecubital area; then place diaphragm of stethoscope over pulsations.
10. Close valve on air bulb and pump air bulb with hand until the column of mercury or needle on gauge reaches 180 mm; if beats are heard, release pressure; wait 15 seconds and pump approximately 20 mm higher or until no beats are heard.
11. Open valve on the air bulb, releasing the pressure slowly.
12. Note the systolic and diastolic reading.
13. Check accuracy by repeating process if necessary, after waiting at least 15 seconds.
14. Record blood pressure.
15. Remove, clean, and store equipment.

PROCEDURE: Perform visual acuity test (Snellen Charts).

Performance Objective

Given a patient and a visual acuity chart, perform a visual screening test to determine the patient's near and distance visual acuity. All steps in the instructor's checklist must be completed with a satisfactory rating. (20/22)

Equipment and Supplies

Visual acuity chart (Snellen)

Performance Guide

1. Determine type and methods of using visual acuity charts.
2. Hang chart at eye level with maximum light.
3. Measure 20 feet from chart and mark line.
4. Explain procedure to patient.
5. Have patient cover eye not being tested, instructing patient not to apply pressure to eye ball.
6. Test one eye at a time.
   a. with glasses on
   b. with glasses off
7. Record patient's reactions during test.
   a. leans forward
   b. appears to squint or strain
   c. eyes tear
8. Record responses of each eye separately, in the form of fractions.
   a. The top number is the distance from the chart.
   b. The lower number is the size of the letter. In 20/30 the patient can read letters 30 mm high at 20 feet.

INSTRUCTOR CHECKLIST: Perform visual acuity tests.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Adjusted visual acuity chart to eye level.		
2. Marked line 20 feet from chart.		
3. Explained to patient what was to be done.		
4. Tested one eye at a time with and without glasses.		
5. Recorded patient's reactions during test.		
6. Recorded response of each eye following test.		

*All steps must be rated acceptable.

PROCEDURE: Positioning and Draping Patient.

Performance Objective

Given a patient, and the necessary supplies, drape the patient for the examination to be performed by the doctor. Draping and positioning must be appropriate for type of examination; there must be maximum exposure of the part of the body being examined; the rest of the patient's body must be unexposed. (2/22)

Safety Factors

1. Do not leave patient unattended.
2. Do not leave doctor alone with patient of opposite sex.

Equipment and Supplies

1. Gowns
2. Sheets
3. Towels
4. Drape

Performance Guide

1. Determine method of positioning:
   a. Sims-rectal examination and pelvic examination
   b. Lithotomy-pelvic or rectal examination
   c. Knee-chest rectal, vaginal and prostatic examination
   d. Proctological or jackknife-sigmoid examination
   e. Dorsal recumbant-examination of anterior part of body
   f. Fowler's examination of heart and chest
2. Explain the procedure for doctor's examination
3. Provide gown and have patient disrobe as required. Provide privacy for patient.
4. Position patient and assist in placing limbs, body.
5. Drape patient providing maximum exposure of area to be examined but covering the rest of patient.

PROCEDURE: Assist with dressing change.

Performance Objective

Given a patient and access to instruments and dressing supplies, assist the physician with a dressing change. The dressing tray must contain all instruments and supplies needed, as verified by the instructor's control tray; the patient must be prepared and area exposed; and assistance must be available to the doctor without delay. (20)

Safety Factors

Contaminated articles must be properly discarded or terminally sterilized.

Equipment and Supplies

1. Instruments
2. Dressing supplies
3. Dressing tray

Performance Guide

1. Ascertain location and type of dressing to be changed.
2. Assemble instruments and supplies.
3. Prepare dressing tray.
4. Prepare patient.
5. Wash hands before and after dressing change.
6. Expose site of wound.
7. Provide physician with materials as needed.
8. Support extremity or head as physician cleans and dresses wound (if necessary).
9. Secure dressing as directed.
10. Care for patient and dismiss.

PROCEDURE: Assist with the collection of Pap smear.

Performance Objective

Given a patient, the necessary supplies and an order for a Pap smear, assist with the collection of the specimen. All items on the checklist must be acceptably completed. (20)

Safety Factors

Carry out good terminal cleaning and sterilizing technique to prevent cross contamination.

Equipment and Supplies

1. Glass slide
2. Laboratory requisition slip
3. Drape
4. Instruments

Performance Guide

1. Assemble the necessary supplies and equipment.
2. Instruct the patient.
3. Label the slides.
4. Position and drape the patient.
5. Inform the doctor that the patient is prepared.
6. Pass the doctor the instruments and supplies as needed.
7. Place specimen on glass slide and spread over the slide area. Two specimens are needed.
8. Fix specimens.
9. Fill out the laboratory requisition slip.
10. Send the material to the laboratory.

INSTRUCTOR CHECKLIST: Assist with collection of Pap smear.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Assembled the necessary supplies.		
2. Instructed the patient.		
3. Labeled the slides.		
4. Positioned and draped the patient.		
5. Informed the doctor the patient was ready.		
6. Passed the physician the materials as needed.		
7. Filled out the laboratory requisition slip.		
8. Prepared slides.		
9. Fixed slides and packed for mailing.		
10. Performed terminal care of room and equipment.		

*All steps must be rated acceptable.

PROCEDURE: Clean instruments.

Performance Objective

Given the necessary equipment and supplies, clean the instruments. Instruments must be opened or dismantled, rinsed in cold running water, scrubbed in detergent solution, rinsed and dried. (20/21)

Safety Factors

Instruments must be sterilized after use to prevent cross contamination.

Equipment and Supplies

1. Soiled instruments
2. Detergent
3. Brush

Performance Guide

1. Assemble soiled instruments, basin and detergent.
2. Prepare detergent solution.
3. Carefully remove knife blades from scalpel. Discard (if disposable).
4. Open forceps and all hinged instruments.
5. Rinse instruments under cold running water.
6. Place in detergent solution.
7. Scrub jaws, hinged areas, and grasping end of individual instruments with brush.
8. Rinse well and dry with clean towel.

PROCEDURE: Disinfect instruments.

Performance Objective

Given the necessary equipment and supplies, disinfect the instruments. Instruments must be opened for maximum surface exposure, completely submerged in disinfecting agent for the required time, rinsed, dried, and stored. (20)

Safety Factors

If instrument is to be kept sterile be sure that contamination does not take place.

Equipment and Supplies

1. Clean, dry instruments
2. Disinfectant solution
3. Pan

Performance Guide

1. Collect clean instruments to be disinfected.
2. Open hinged or jointed instruments. Disassemble, if necessary.
3. Disinfect by boiling: completely immerse instruments in boiling water for not less than 20 minutes, OR
4. Disinfect by chemicals:
   a. Read instructions for disinfectant solution.
   b. Prepare solution, filling pan 3/4 full.
   c. Place clean and dry instruments into solution.
   d. Check to make sure that all parts of each instrument are immersed in the solution.
   e. Close lid on pan and begin timing.
   f. At the end of the disinfectant time (15-20 minutes), remove the instruments with sterile transfer forceps, rinse with sterile water and place on sterile field, or dry with sterile towel and wrap in sterile pad.
   g. If instruments are to remain in solution until needed, add an anti-rust solution to disinfectant.

PROCEDURE: Unwrap or open sterile packages maintaining sterility of contents.

Performance Objective

Given packages containing sterile items, unwrap or open the package. Contents of packages must not be touched by any nonsterile surfaces. (20)

Safety Factors

Do not touch the side of the wrapper next to the sterile item.

Equipment and Supplies

1. Sterile items
2. Wrapper

Performance Guide

1. Open wrapped packages:
   a. Hold package in left or right hand or place on hard surface.
   b. Remove tape.
   c. Lift top section of wrapper back and let it fall to distal side.
   d. Grasp turn back corner and fold back side cover letting it fall to side. Repeat process and fold back cover on other side.
   e. Grasp turn back corner on bottom section and fold back letting it drop without touching uniform.
   f. Drop contents into sterile field or hand to person wearing sterile gloves, or transfer forceps.
2. Open sealed packages:
   a. Grasp pull away flaps.
   b. Pull package open exposing content.
   c. Drop item into sterile field.

PROCEDURE: Package linens or instruments for sterilization.

Performance Objective

Given the necessary equipment and supplies, package the linens or instruments for sterilization. Packages must be small, loosely packed, secured, labeled, and dated. (2/22)

Safety Factors

Inspect items to ascertain absence of hair.

Equipment and Supplies

1. Sponges
2. Towels
3. Cotton balls
4. Wrapping materials
5. Sterilizer indicator
6. Sterilization tape
7. Instruments

Performance Guide

1. Assemble supplies to be sterilized.
2. Inspect linens for holes or rust spots. Discard damaged linens.
3. Assemble wrapping materials.
4. Sort items into small packets.
5. Wrap packages loosely, completely covering all articles.
6. Secure package with tape or by heat sealing method.
7. Label and date package.
8. One sterilizer indicator should be placed in each sterilizer load.

PROCEDURE: Sterilize supplies and instruments using the moist heat method.

Performance Objective

Given the necessary equipment and supplies, sterilize the items using the moist heat method. All steps in the instructor's checklist must be acceptably completed. (22)

Safety Factors

1. Safety goggles must be worn when venting and/or opening autoclave.
2. Be careful that burns do not occur when loading and unloading supplies.

Equipment and Supplies

1. Steam-pressure autoclave
2. Packaged instruments.

Performance Guide

1. Assemble packaged supplies and determine whether materials can be steam-pressure autoclaved without damage.
2. Observe safety precautions as indicated on the autoclave.
3. Preheat autoclave chamber.
4. Separate packaged items according to materials to be sterilized together.
5. Arrange items on tray to allow for maximum heat circulation, and load chamber.
6. Close and lock autoclave door.
7. Set timer and temperature gauge according to load requirements.
8. When timer rings:
   a. Vent steam.
   b. Dry items.
9. Unload autoclave, cool and store items. (Store only cool items to prevent contamination by sweating.)

INSTRUCTOR CHECKLIST: Sterilize supplies and instruments using moist heat methods.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Sorted packages according to content.		
2. Checked time and temperature chart.		
3. Preheated autoclave		
4. Arranged items on tray allowing for circulation of steam through and around each package.		
5. Set timer and temperature gauges according to load requirements.		
6. Locked autoclave door.		
7. When timer rang:		
a. vented steam.		
b. dried items.		
c. cooled items		
8. Unloaded autoclave.		

*All steps must be rated acceptable.

PROCEDURE: Sterilize supplies using the dry heat method.

Performance Objective

Given the necessary equipment and supplies, sterilize the items using the dry heat method. All steps in the instructor's checklist must be acceptably completed. (22)

Safety Factors

Be careful that burns do not occur when loading and unloading supplies.

Equipment and Supplies

1. Dry heat autoclave
2. Packaged supplies

Performance Guide

1. Assemble prepared packages:
   a. instruments
   b. rubber supplies
   c. powders, oils, ointments
2. Separate packaged supplies according to materials which should be sterilized together.
3. Prepare autoclave.
4. Arrange items on autoclave tray for maximum flow of heat around items, and load chamber.
5. Close and lock autoclave door.
6. Observe safety precautions in using autoclave.
7. Set timer and temperature gauge for prescribed time and temperature according to type of materials autoclaved.
8. Cool and store supplies.

INSTRUCTOR CHECKLIST: Sterilize supplies using dry heat method.

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Separated packaged items according to type of contents.		
2. Checked time and temperature chart.		
3. Preheated autoclave.		
4. Arranged items on tray providing for adequate circulation of heat through each package.		
5. Loaded chamber.		
6. Set timer and temperature gauge according to type of materials autoclaved.		
7. Observed safety precautions in using autoclave.		
8. Cooled and stored supplies.		

*All steps must be rated acceptable.

SECTION VI - MEDICAL LABORATORY ASSISTANT

Medical laboratory assistants are individuals prepared to perform routine laboratory procedures in bacteriology, blood banking, chemistry, hematology, parasitology, serology and urinalysis. Standardized training and national certification under medical auspices are provided by posthigh school certified laboratory assistant programs. Medical laboratory assistants work under the direct supervision of the medical technologist.

The following procedures are relevant to the medical laboratory assistant phase of the Health Assistant Curriculum.

PROCEDURE: Assist with the collection of a random voided urine specimen.

Performance Objective

Given a patient and appropriate supplies, collect a urine specimen for a routine urinalysis as ordered by the doctor. The specimen must be collected in a clean container, labeled with donor's name, date, and type of specimen and must be at least 5 cc in volume. (29)

Safety Factors

1. Send urine to lab immediately or refrigerate.
2. If you are collecting specimens from more than one patient at a time, put some mark of identification on the cap itself to avoid confusion.
3. Wash hands immediately should they become contaminated with any patient's urine.

Equipment and Supplies

1. Urine container
2. Label
3. Requisition

Performance Guide

1. Instruct the patient (no toilet tissue in specimen).
2. Direct the patient to the bathroom.
3. Give the patient a suitable container.
4. Label the collected specimen:
   a. name, age, sex
   b. identification number when designated
   c. date and time of collection
   d. type of specimen
   e. test requested
5. Complete requisition slip.
6. Take the specimen to the laboratory.

PROCEDURE: Assist with the collection of clean catch or sterile urine specimens.

Performance Objective

Given a patient and the necessary supplies, assist with the collection of a clean catch or sterile urine specimen as ordered by the doctor. All items on the checklist must be completed acceptably. (29)

Safety Factors

1. Send urine to lab or refrigerate.
2. If you are collecting specimens from more than one patient at a time, put some mark of identification on the cup itself to avoid confusion.
3. Wash hands immediately should they become contaminated with any patient's urine.

Equipment and Supplies

1. Urine container
2. Label
3. Requisition
4. Cleansing solution
5. Drape

Performance Guide

A. Mid-stream specimen
   1. Instruct the patient to wash hands and external genitalia.
   2. Provide the appropriate cleansing equipment and solution. (Give directions for cleansing male and female genital area.)
   3. Instruct the patient in the method of collecting the specimen:
      a. Void the first small amount into the toilet.
      b. Collect the indicated amount of urine into the container.
      c. Hand the container back to the assistant without touching the lip or inside of the container.
   4. Remove the top of the container maintaining sterile techniques.
   5. Hand the container to the patient.
   6. Upon receiving the container from the patient, replace the top without contaminating the specimen.
   7. Label the specimen:
      a. patient's name, age, sex
      b. identification number
      c. test requested
      d. date and time specimen collected
      e. type of specimen

B. Catherterized specimen
   1. Assemble supplies and equipment.
   2. Explain procedure to patient.

Performance Guide (Continued)

3. Position and drape patient.
4. Inform physician or nurse that patient is prepared for procedure.
5. When the specimen has been handed to the assistant, label it immediately.
   a. patient's name, age, sex
   b. identification number
   c. test requested
   d. date and time specimen collected
   e. type of specimen

INSTRUCTOR CHECKLIST: Assist with the collection of clean catch or sterile urine specimens

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
For mid-stream specimen 1. Instructed patient to wash hands		
2. Instructed patient to wash external genitalia		
3. Instructed patient in the method of collecting specimen		
4. Maintained sterility of the container top throughout the process		
5. Labeled specimen		
For catherterized specimen 1. Assembled supplies and equipment		
2. Explained procedure to patient		
3. Positioned patient		
4. Draped patient		
5. Informed physician or nurse that patient was prepared for catherterization		
6. Labeled specimen		

*All steps must be rated acceptable.

PROCEDURE: Collect a 24-hour urine specimen

Performance Objective

Given the necessary equipment and supplies, collect a 24-hour urine specimen. The following criteria must be met:

1. The first specimen must be discarded.
2. All urine must be collected for 24 hours.
3. Specimen containers must be labeled with the date, the patient's name and room number.
4. Urine must be kept on ice or refrigerated. (1/30)

Safety Factors

1. Report immediately if any specimens are discarded accidentally.
2. Instruct patient that no toilet tissue should be placed in vessel with specimen.
3. If patient is an in-patient, a sign should be posted on door, bed or stand to alert agency staff.

Equipment and Supplies

1. Bedpan or urinal
2. Large bottle
3. Time schedule
4. Label and requisition

Performance Guide

1. Collect necessary equipment and prepare equipment according to agency standards.
2. Label bottle.
3. Wash hands
4. Identify patient.
5. Inform patient that all urine voided in a 24-hour period will be saved and kept cool.
6. Dispose of first specimen (unless otherwise instructed).
7. Collect all urine voided for the specified 24-hour period.
8. After collection is completed, take immediately to laboratory.
9. Clean equipment.
10. Wash hands.
11. Report that specimen has been collected.

PROCEDURE: Check urine using keto-diastik

Performance Objective

Given a urine specimen and keto-diastik kit, check urine for sugar and acetone using keto-diastik. The correct color of the test medium must be recorded and simultaneously observed by the instructor. The findings must agree exactly with those of the instructor. (6)

Safety Factors

1. Discard reagents and cleanse equipment throughly.
2. Wash hands.

Equipment and Supplies

1. Urine specimen
2. Keto-diastik kit

Performance Guide

1. Place designated end in urine for two seconds.
2. Remove excess urine by tapping on side of specimen container.
3. Wait 15 seconds.
4. Compare ketone reagent area of strip to color chart.
5. At 30 seconds compare glucose reagent area of strip to color chart.
6. Report results.
7. Report to proper authority.

PROCEDURE: Test urine for sugar and acetone

Performance Objective

Given the necessary supplies for performing a test of glucose and acetone in the urine, and a fresh urine specimen, test the urine specimen for glucose and acetone. Each specimen must be analyzed without error and recorded. (1)

Safety Factors

1. Do not touch bottom of tube when using clinitest. It is hot.
2. Do not touch wet dipstick against color chart.

Equipment and Supplies

1. Urine specimen
2. Test materials

Performance Guide

A. Test urine for sugar or acetone using designated tablets.
   1. Clinitest
      a. Put five drops of urine in test tube.
      b. Rinse dropper.
      c. Put ten drops of water in test tube.
      d. Mix urine and water.
      e. Drop one Clinitest tablet in test tube; do not shake tube until 15 seconds after boiling stops.
      f. Shake tube and compare color of specimen with color chart.
      g. Record results of test.
   2. Acetest
      a. Place Acetest tablet on paper.
      b. Drop one drop urine on tablet.
      c. Wait 30 seconds.
      d. Compare color of tablet with color chart.
      e. Records results of test.

B. Test urine for sugar and acetone using reagent strips.
   1. Remove reagent strip.
   2. Immerse reagent area of strip in fresh urine.
   3. Remove from specimen as indicated on directions.
   4. Tap to remove excess urine.
   5. Compare test area with color chart, observing time indicated on directions.
   6. Record the results of the test.

PROCEDURE: Check urine using test-tape

Performance Objective

Given a urine specimen, color chart, and test-tape set, check urine for sugar using test-tape. The correct color of the test medium must be recorded and reported to the instructor. (6)

Safety Factors

1. Do not touch moist portion to tape to color chart.
2. Discard materials correctly, cleanse equipment.
3. Wash hands.

Equipment and Supplies

1. Urine specimen
2. Color chart
3. Test-tape set

Performance Guide

1. Remove 1 1/2 test-tape from dispenser.
2. Dip one end of test-tape into urine specimen.
3. Remove tape from urine, tap lightly on side of urine specimen container to remove excess urine, and wait one minute.
4. Compare tape with color chart. If color on tapes varies, use darker portion of tape.
5. Record and report observations.

PROCEDURE: Assess and record color, gross appearance, and odor of urine specimen

Performance Objective

Given specific urine specimens, assess and record the color, gross appearance, and odor of each urine specimen. The results must correspond with the instructor's previously determined results. (31)

Safety Factors

1. Wash hands immediately should they become contaminated with any patient's urine.

Equipment and Supplies

1. Urine specimen

Performance Guide

1. Observe and record the color:
   a. straw
   b. light yellow
   c. yellow
   d. amber
   e. pale green
   f. reddish
   g. brown
   h. smokey

2. Note the gross appearance:
   a. cloudy
   b. clear
   c. mucoid
   d. bloody
   e. clear with sediment
   f. other

3. Note the odor
   a. aromatic
   b. ammoniacal
   c. putrid
   d. fruity

4. Record the results

PROCEDURE: Perform urine specific gravity tests

Performance Objective

Given the necessary equipment and supplies, determine the specific gravity of the specimen. The results must correspond exactly with the supervisor's results. (31)

Safety Factors

1. Be sure urinometer is not cracked or chipped.
2. Use an uncentrifuged urine sample.
3. Break wooden applicator before discarding in lined waste container.
4. Wash hands immediately should they become contaminated with any patient's urine.

Equipment and Supplies

1. Urine specimen
2. Urinometer

Performance Guide

1. Mix the specimen with a dry wooden applicator.
2. Pour the specimen into a dry cylinder.
3. Spin a dry urinometer in specimen.
4. Record the mark at which the bottom of the meniscus touches the scale of the freely floating urinometer.
5. Record results.

PROCEDURE: Perform routine biochemical urine tests

Performance Objective

Given the necessary equipment and supplies, perform routine biochemical tests; pH, protein, sugar, ketones, bilirubin, and occult blood on the urine specimen following the manufacturer's directions. The test results must correspond exactly to that of the instructors. (1)

Safety Factors

1. Do not allow wet dipstick to touch color chart.
2. Dispose of wet dipstick into lined trash container or wrap wet dipstick with tissue before discarding in unlined trash container.
3. Wash hands.

Equipment and Supplies

1. Urine sample
2. Dipstick
3. Color chart

Performance Guide

1. Assemble the necessary supplies.
   a. dipstick
   b. color chart
2. Dip the stick into the well-mixed urine.
3. Compare the dipstick with the color chart within the indicated time frame.
   NOTE: For any area showing a positive reaction, perform a "back-up" test for that chemical, if directed.
4. Record results.
5. Clean the work area.

PROCEDURE: Prepare urine specimen for microscopic examination

Performance Objective

Given a urine specimen and the necessary equipment and supplies, prepare the urine specimen for microscopic examination. (2)

Safety Factors

Place a tube of urine or water opposite the urines being spun to balance the centrifuge.

Equipment and Supplies

1. Urine specimen
2. Centrifuge.

Performance Guide

1. Place identification number of mark on centrifuge tube containing specimens.
2. Open cover of centrifuge.
3. Empty cups.
4. Balance centrifuge head.
5. Turn timer on.
6. Gradually increase speed to a maximum of 1,500 rpm. (observe safety precautions).
7. Allow specimen to spin for 305 minutes. (or according to manufacturer's directions.)
8. Open centrifuge and remove specimen after the machine comes to a full stop.
9. Gently remove specimen without remixing.
10. Separate the supernatant from the sediment, pour quickly.
11. Resuspend the sediment by shaking tube.
12. Place one drop of sediment on a clean slide, cover with cover slip-drop cover slip facing away from you.
13. Place slide on microscope stage and focus on low power.

PROCEDURE: Assist physician with microscopic urinalysis

Performance Objective

Given specific urine samples, and other necessary supplies and equipment prepare the specimen for microscopic urinalysis to be performed by physician. Record results as dictated. (31)

Safety Factors

1. Be sure you understand how to use and care for the microscope you are using.
2. Wash hands after clean-up.

Equipment and Supplies

1. Microscope
2. Centrifuge
3. Urine sample
4. Note pad

Performance Guide

A. Procedure:
   1. Note the age of specimen.
   2. Centrifuge specimen
   3. Decant supernatant
   4. Resuspend sediment
   5. Transfer a drop of sediment to a glass slide
   6. Coverslip
   7. Place on stage of microscope on low power
   8. Report to physician that specimen is prepared for examination

B. Record results as dictated:
   1. Red blood cells-per HpF, e.g. 0-1/HPF
   2. White blood celle-per HpF, e.g. 0-3/HPF
   3. Casts-per LpF
   4. Crystals-e.g. many, few, occasional, negative
   5. Bacteria-e.g. many, few occasional, negative

NOTE TO INSTRUCTOR

Care and use of the microscope should be included in related units of instruction prior to teaching laboratory skills.

PROCEDURE: Obtain a capillary blood specimen

Performance Objective

Given a patient and the necessary equipment and supplies, obtain a capillary blood specimen for a test ordered by the doctor. Appropriate site must be prepared and adequate specimen for the indicated test must be secured. (1/29)

Safety Factors

1. Always use a sterile lancet for each puncture.
2. Replace lancet in original wrapping and dispose of lancet immediately.
3. Wash hands.

Equipment and Supplies

1. Sterile disposable lancets
2. Capillary tubes
3. Alcohol sponges
4. Labels
5. 2 X 2 sponge

Performance Guide

1. Determine the type and amount of specimen needed.
2. Assemble the equipment.
3. Identify the patient.
4. Explain the procedure to the patient.
5. Clean the puncture site with alcohol sponge and milk blood to finder tip.
6. Allow the site to dry.
7. Handle the lancet aseptically.
8. Puncture the dry skin in the appropriate spot:
   a. infants: heel or toe
   b. adults: finger or ear
9. Obtain a free flowing specimen.
10. Wipe off the first drop of blood with a sterile 2 X 2 gauze.
11. Hold the collection devices to the drop.
12. Collect a sample adequate for the indicated test. Touch only blood to collection device.
13. Clean the area when sufficient blood is obtained.
14. Apply alcohol sponge until bleeding is stopped.
15. Label the specimens.

PROCEDURE: Perform hematocrit test

Performance Objective

Given the necessary equipment and supplies, determine the hematocrit of each blood sample. (1/30)

Safety Factors

1. Use a presterilized disposable lancet to obtain specimen.
2. Wash hands.

Equipment and Supplies

1. Samples of whole blood
2. Centrifuge
3. Micro-hematocrit reader
4. Presterilized disposable lancet
5. Microhematocrit heparinized capillary tubes

Performance Guide

1. Fill the microhematocrit heparinized capillary tubes to within 2 cm of the end.
2. Seal the vacant end of the tube and place in the appropriate numbered slot in the centrifuge head.
3. Centrifuge the tubes in a microhematocrit centrifuge for 5 minutes at 10,000rpm or as manufacturer directs.
4. Read the hemocrit as the percentage of packed red cells per volume of blood used.
5. Record the results, e.g. Hct. 38%

PROCEDURE: Perform fingerstick blood sugar screening test (Dextrostix)

Performance Objective

Given a patient, the doctor's order for a finderstick blood sugar screening test, and the necessary supplies, perform the test. (1)

Safety Factors

1. Shelf life of Dextrostix appears limited. Do not use if test area does not compare with "o" block on color chart.
2. Use presterilized lancet.
3. Wash hands.

Equipment and Supplies

1. Stop watch (or watch with a sweep second hand)
2. Bottle of Dextrostix
3. Water in a wash bottle
4. Container to catch water from the wash bottle

Performance Guide

1. Remove test strip from bottle; replace lid immediately. Compare test area with "0" block on the color chart. Discard if the two colors do not easily match.
2. Perform the fingerstick:
   a. Wipe off first drop of blood with sterile gauze.
   b. Apply a large drop of capillary blood to cover the entire reagent are on printed side of strip.
   c. Wait 60 seconds.
   d. Quickly wash off blood using a wash bottle.
   e. Read results within one or two seconds after washing by holding the strip close to the color chart.
3. Record the results.

PROCEDURE: Stain blood smears

Performance Objective

Given a specimen of blood and the necessary supplies, stain the specimen for a differential count. (1/30)

Safety Factors

1. Use sterile lancet if performing finger puncture.
2. Wash hands

Equipement and Supplies

1. Sterile lancet
2. Slide

Performance Guide

1. Place the appropriate identifying mark on the slide.
2. Place a drop of blood obtained by finger puncture with sterile lancet on one edge of slide.
3. Make a film of blood by holding another slide at a 25 degree angle then pushing to spread drop to a feathered edge.
4. Air dry the slide.
5. Stain according to manufacturers directions.

INSTRUCTOR CHECKLIST: Stain blood smears for a differential count

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Placed identifying mark on slide		
2. Mixed blood specimen thoroughly		
3. Made blood film with a feathered edge		
4. Air dried slide		
5. Followed manufacturer's directions for staining		
6. Red and white cells on the slide were clearly separated		
7. Cytoplasm of the medium to large lymphocytes was stained a pale green to a deeper powdery blue		
8. Red blood cells appeared orange-red in color		

*All steps must be rated acceptable.

PROCEDURE: Collect eye, nose, and throat specimens for culture and sensitivity

Performance Objective

Given a patient and the necessary supplies, collect an eye, nose or throat specimen for culture and sensitivity as ordered by the doctor. The swab must have touched only that area needed for the culture and sensitivity study, must be placed in container, and labeled with patient's name, type of specimen, time and date specimen was taken. (30)

Safety Factors

1. Label all specimens immediately.
2. Wash hands

Equipment and Supplies

1. Applicator or swab
2. Sterile disposable culture tube
3. Label
4. Pencil

Performance Guide

1. Assemble the necessary materials.
2. Instruct the patient.
3. Touch area to be cultured with a sterile swab or applicator.
4. Do not allow swab to touch anything else before placing it in the container.
5. Place the swab in the appropriate container. (A sterile disposable culture tube is usually the container of choice.)
6. Label the specimen:
   a. date
   b. time
   c. patient identification
   d. type of specimen
   e. any other required information
7. Send the specimen to the laboratory immediately.

PROCEDURE: Perform white blood cell count

Performance Objective

Given specific labeled blood specimens and the necessary supplies and equipment, determine the white blood count of each sample. The diluting fluid must not be contaminated with blood. The cells in each of the four squares must not vary by more than ten cells. (25)

Safety Factors

1. Use disposal sterile lancet and dispose of as instructed.
2. Clean pipettes and equipment according to instructions.
3. Do not touch fingertip with pipette.
4. Do not contaminate diluting fluid with blood.

Equipment and Supplies

1. Alcohol sponges
2. Dry 2 X 2 gauzes
3. Sterile disposal lancet
4. Pipettes
5. Counting chamber
6. Miscroscope
7. Diluting solution

Performance Guide

1. Assemble equipment.
2. Cleanse finger with alcohol. Let dry or wipe dry with sterile gauze.
3. Milk finger towards tip.
4. Perform fingerstick with sterile lancet.
5. Wipe off first drop of blood with sterile gauze.
6. Draw blood up to 0.5 mark in white cell pipette.
7. Wipe off tip of pipette quickly and plunge into white diluting solution drawing up to the 11 mark.
8. Rotate pipette gently in figure "8" motion for 1 1/2-2 minutes or use mechanical pipette shaker according to manufacturer's instructions.
9. Discharge the diluting fluid in stem of pipette before loading chamber. This is done by tapping tip of pipette against paper toweling moistened with water.
10. Immediately charge counting chamber by scoring against cover glass which has been placed on top of counting chamber over troughs which extend parallel to each other. (see reference)
11. Allow to settle 1-2 minutes.
12. Locate white counting squares with low-power objective of miscroscope which are in the extreme corners of the rules areas. (see reference)

Performance Guide (continued)

13. Count all cells seen in 4 corner squares. (Each corner contains 16 smaller squares.
14. Multiply the total of all 4 squares by 50.
15. Record the total.

PROCEDURE: Assist with the collection of microorganism smear

Performance Objective

Given a patient, the necessary supplies and an order for a smear for microorganisms, assist with the collection of the specimen.

Safety Factors

1. Label slide before smearing.
2. Place marked slide in another labled container.
3. Dispose of used equipment in lined trash receptable or wrap if putting in unlined receptable.
4. Wash hands.

Equipment and Supplies

1. Slides
2. Label
3. Specimen container
4. Swab or applicators

Preformance Guide

1. Prepare the patient for the procedure.
2. Assemble the necessary supplies.
3. Pass supplies to doctor for throat, urethral, vaginal, ear, wound, or eye smear.
4. Spread the material on an area near the center of the slide and let it air dry.
5. Label the specimen container:
   a. name
   b. number
   c. date
   d. source of specimen
6. Send to lab as instructed.

INSTRUCTOR CHECKLIST:

ACTIVITY	RATINGS*	
	Acceptable	Unacceptable
1. Prepared the patient		
2. Assembled the necessary supplies		
3. Passed indicated supplies to the physician		
4. Spread the material on the slide		
5. Labeled the specimen		

*All steps must be rated acceptable.

PROCEDURE: Stain microbiological smear

Performance Objective

Given a microbiological, the necessary stain, and other supplies, stain the smear with Gram stain. When viewed under the microscope the organisms must be clearly visible and differentiable. (1/30)

Safety Factors

1. Flame innoculating loop before and after obtaining smear if material for smear comes from a bacterial culture.
2. Use sterile cotton applicator or sterile tongue blade to obtain smear from body orifice.
3. Wrap and discard tongue blade or applicator.
4. Wash hands.

Equipment and Supplies

1. Stain
2. Slide
3. Cotton applicator or tongue blade
4. Innoculating loop

Performance Guide

1. Smear a sample of the specimen on a slide.
2. Fix the smear with heat.
3. Flood the slide with alkaline crystal violet solution for 1-2 minutes.
   NOTE: The times will vary according to the manufacturer.
4. Pour off excess stain and wash in tap water.
5. Shake off water from slide.
6. Flood with iodine solution.
7. Allow iodine solution to react for 1-2 minutes.
8. Shake off water but do not allow slide to dry.
9. Flood with 95% alcohol.
10. Wash thoroughly in tap water.
11. Shake off excess water.
12. Counterstain for 15-20 seconds with safranin solution.
    NOTE: The times will vary according to the manufacturer.
13. Drain safranin off the slide and rinse with tap water.
14. Blot underside of slide dry and air dry stained surface.

NOTE TO INSTRUCTORS:

1. Students should be able to place slide on stage of microscope and focus under low, high, and oil immersion for examination by physician.
2. Student should be able to differentiate between Gram positive and negative organisms.

PROCEDURE: Test stool specimens for occult blood using commerical slide

Performance Objective

Given the necessary supplies and equipment and a stools specimen, test the specimen for occult blood using a commerical slide manufactured for that purpose.

Safety Factors

1. Discard applicator used to smear the stool specimen by placing in lined trash receptable or wrapping before discarding.
2. Wash hands.

Equipment and Supplies

1. Stool specimen
2. Container
3. Commerical slide

Performance Guide

1. Follow the procedure:
   a. See that working area, equipment and hands are free of blood.
   b. Spread a small amount of feces on the slide.
   c. Close front flap over stool specimen.
   d. Turn slide to other side-open flap.
   e. Apply reagent as manufacturer directs.
2. Observe and report results:
   a. Time as manufacturer directs.
   b. Read results according to chart provided by manufacturer. Appearance of blue color usually indicated a positive result.
   c. Record results--e.g. stool negative for occult blood.

NOTE TO INSTRUCTORS

Student should be instructed that this procedure can be used to test emesis or naso-gastric drainage.

PROCEDURE: Collect and label sputum specimen

Performance Objective

Given a patient and necessary supplies, collect and label a sputum specimen. One to two tablespoons of specimen must be collected without contamination from other sources. The label must be legible and included the patient's name, room number or address, and date and time of beginning and ending of collection. (6/26)

Safety Factors

Avoid contamination of outside of container and hands during collection and transportation of specimen to the laboratory.

Equipment and Supplies

1. Sputum specimen
2. Container
3. Label
4. Laboratory slip
5. Pencil

Performance Guide

1. Wash hands.
2. Obtain necessary materials, such as container and cover for specimen, tissues, label for container, and the laboratory requisition slip.
3. Complete label, using patient's full name, room number or address, date, and time of collection.
4. Check to see that laboratory slip is legible, marked with identifying information, contains test to be performed, and signature.
5. Take all items except lab slip to patient's room.
6. Approach and identify patient.
7. Have patient to rinse out mouth.
8. Instruct patient on how to collect specimen. Encourage patient to cough and bring up material from lungs and bronchil, not from nasal pharynx.
9. Direct patient to hold the sputum container close to his/her mouth and expel the expertorated sputum into the container.
10. Assist the patient to provide an immediate specimen if possible. NOTE: Provide privacy for patient during procedure.
11. Collect at least 1 to 2 tablespoons of sputum unless directed otherwise.
12. Seal container with lid, wash and dry outside.
13. Wash hands.
14. Label container.
15. Deliver to laboratory with label requisition.
16. Record, file or chart that specimen sent to lab.

PROCEDURE: Collect and label stool specimen

Performance Objective

Provided a patient, assignment sheet for a stool specimen, a laboratory requistion, and the necessary equipment and supplies, collect and prepare a stool specimen for laboratory analysis. A bladefull of specimen must be placed in a container. The container must be labeled with the patient's name. (6)

Safety Factors

1. Avoid direct contamination of hands with fecal material.
2. Dispose of tongue blades properly.
3. Wash hands.

Equipment and Supplies

1. Stool specimen
2. Container
3. Tongue blades
4. Bedpan or bedside commode

Performance Guide

1. Check assignment sheet.
2. Wash hands.
3. Assemble equipment and supplies.
4. Identify patient and explain procedure.
5. Prepare bedpan or bedside commode for collection of stool.
6. Provide for patient's privacy.
7. Take bedpan or bedside commode with stool to utility room or appropriate area.
8. With tongue blades, remove feces and place into specimen container.
   NOTE: If large amount of stool is present, select random sample of all types of stool present.
9. Seal and label specimen container.
10. Wash hands.
11. Provide for patient's comfort.
12. Send properly labeled specimen to laboratory, immediately.
13. Wash hands.
14. Record procedure.

APPENDIX A

PROCEDURE INVENTORY FOR CURRICULUM DEVELOPMENT

The procedure inventory can be utilized by the local health occupations education teachers to determine which procedures are relevant to there curriculum. The check off list to the left of the procedures will assist the teacher in determining which procedures need to be added, deleted, changed or remain as written.

APPENDIX A

PROCEDURE INVENTORY FOR CURRICULUM DEVELOPMENT

Manual Content Evaluation				Procedures Section I: Nursing Assistant	Page
Add	Delete	Change	OK		
				1. Handwashing and checklist	I-1
				2. Assist with admission and checklist	I-3
				3. Assist patient in dressing and undressing	I-5
				4. Assist patient in using a bedpan	I-6
				5. Assist patient in using urinal	I-7
				6. Give or assist patient in taking bath	I-8
				7. Tub bath	I-10
				8. Give backrub and massage	I-11
				9. Brush and/or comb hair	I-12
				10. Care of toenails and fingernails	I-13
				11. Assist with oral hygiene	I-14
				12. Giving oral hygiene	I-15
				13. Assisting with oral hygiene and denture care	I-16
				14. Shaving the male patient	I-17
				15. Assist with active range of motion exercises	I-18
				16. Applying restraints	I-19
				17. Care of the incontinent patient	I-20
				18. Make occupied bed	I-21
				19. Make unoccupied bed	I-22
				20. Make the postoperative or recovery bed	I-23
				21. Prepare and assist patient in eating	I-24
				22. Feed patient (adult)	I-25
				23. Observe, measure and report food and fluid intake	I-26
				24. Observe, measure and report output of patient	I-27
				25. Assist patient to dangle	I-28
				26. Assist patient to ambulate	I-29
				27. Assist patient in walker use	I-31

Manual Content Evaluation				Procedures Section I: Nursing Assistant Continued	Page
Add	Delete	Change	OK		
				28. Transfer patient using mechanical lifts	I-32
				29. Assist patient to and from a wheelchair	I-33
				30. Transport patient by wheelchair	I-34
				31. Move patient between a stretcher and a bed using three-man lift or transfer sheet	I-35
				32. Shampoo patient's hair	I-37
				33. Give skin care to patient with decubitus ulcers	I-38
				34. Give skin care to a patient in cast and/or traction	I-39
				35. Apply hot water bottle	I-40
				36. Apply heating pads	I-41
				37. Apply ice bags	I-42
				38. Insert rectal tube	I-43
				39. Prepare and give an enema	I-44
				40. Administer sitz bath	I-45
				41. Apply ace bandage	I-46
				42. Assist with transferring patient	I-47
				43. Isolation technique	I-48
				44. Assist with discharge	I-50
				45. Post-mortum care-agency and home	I-51
				46. Initiate and route incident or accident reports	I-52

PROCEDURE INVENTORY FOR CURRICULUM DEVELOPMENT

Manual Content Evaluation				Procedures Section II: Home Health Assistant	Page
Add	Delete	Change	OK		
				1. Baby Holds	II-1
				2. Bathing the baby	II-3
				3. Feeding the baby	II-5
				4. Assist patient to bathroom	II-6
				5. Assist with removing or remove fecal inpaction	II-7
				6. Assist in putting on or removing braces of a patient	II-8

PROCEDURE INVENTORY FOR CURRICULUM DEVELOPMENT

Manual Content Evaluation				Procedures Section III: Medical and Dental Office Procedures	Page
Add	Delete	Change	OK		
				1. Maintain office environment and checklist	III-1
				2. Place telephone call and checklist	III-3
				3. Receive telephone calls	III-5
				4. Maintain appointment book	III-6
				5. Maintain appointment control	III-7
				6. Maintain an active recall system	III-8
				7. Maintain an appointment reminder system	III-9
				8. Schedule patient appointments	III-10
				9. Receive patients and visitors (Doctor's Office) and checklist	III-11
				10. Receive patients and visitors (Dentist Office)	III-13
				11. Complete registration form for a new patient	III-14
				12. Take and record patient's medical and dental history	III-15
				13. Prepare medical file for a new patient	III-16
				14. Explain doctor's fees	III-17
				15. Collect fees for medical or dental services	III-18
				16. Issue receipts	III-19
				17. Reconcile cash accounts and receipts	III-20
				18. Complete daily record sheet	III-21
				19. Prepare bank deposit slips	III-23
				20. Maintain petty cash fund	III-25
				21. Maintain separate patient financial and treatment records	III-27
				22. Process charge slips	III-28
				23. Assemble patient records for treatment and checklist	III-30
				24. Gather data for necessary reports regarding referrals to other doctors	III-32
				25. Make referral appointment for patients	III-33
				26. Arrange for patient's admission to hospital	III-34
				27. Schedule patient for out-patient diagnostic tests	III-35

PROCEDURE INVENTORY FOR CURRICULUM DEVELOPMENT

Manual Content Evaluation				Procedures	
Add	Delete	Change	OK	Section III: Medical and Dental Office Procedures Continued	Page
				28. Prepare outside agency file	III-36
				29. Prepare statements for mailing	III-37
				30. Type correspondence from rough draft	III-38
				31. Prepare correspondence	III-39
				32. Prepare purchase requisitions	III-40
				33. Review invoices for validity and accuracy	III-41
				34. Process incoming mail	III-42
				35. Order supplies	III-43
				36. Complete Medicare forms	III-44
				37. Complete Medicaid forms	III-45
				38. Complete Blue Shield Forms	III-46
				39. Complete Champus form	III-47
				40. Complete workmen's compensation forms	III-48
				41. Complete dental insurance forms	III-49

PROCEDURE INVENTORY FOR CURRICULUM DEVELOPMENT

Manual Content Evaluation				Procedures Section IV: Dental Assistant	Page
Add	Delete	Change	OK		
				1. Handwashing and checklist	IV-1
				2. Seating the patient and checklist	IV-4
				3. Give instruction in oral hygiene and checklist	IV-7
				4. Prepare set-up for prophylaxis and checklist	IV-9
				5. Prepare set-up for anticarogenic treatment	IV-11
				6. Chart oral conditions as dictated by the dentist	IV-12
				7. Prepare for administration of local anethetic injection	IV-13
				8. Assist with the administration of local anesthesia and checklist	IV-14
				9. Prepare for cavity preparation and checklist	IV-16
				10. Assist with cavity preparation and checklist	IV-18
				11. Assist with cavity preparation	IV-21
				12. Maintain asepsis while handling sterile items	IV-26
				13. Apply and remove vac-ejector and checklist	IV-27
				14. Apply saliva ejector and checklist	IV-31
				15. Prepare composites for restoration	IV-33
				16. Prepare amalgam for restoration	IV-34
				17. Assist with amalgam restoration and checklist	IV-36
				18. Prepare silicate cement for restoration	IV-38
				19. Assist with acrylic restoration and checklist	IV-40
				20. Explain pre-operative instructions to the patient and checklist	IV-43
				21. Prepare for oral surgery procedure and checklist	IV-45
				22. Assist with oral surgery and checklist	IV-47
				23. Explain post-operative instructions to the patient and checklist	IV-50
				24. Prepare cement as a protective base (Zinc phosphate cement)	IV-52
				25. Prepare cement as a protective base (Zinc oxide-eugenal cement)	IV-53
				26. Prepare impression materials and checklist	IV-54
				27. Assist with taking impressions and checklist	IV-56

PROCEDURE INVENTORY FOR CURRICULUM DEVELOPMENT

Manual Content Evaluation				Procedures Section IV: Dental Assistant Continued	Page
Add	Delete	Change	OK		
				28. Stabilize and remove impressions	IV-58
				29. Prepare set-up for prosthetics (fixed)	IV-59
				30. Prepare set-up for prosthetics (removal)	IV-60
				31. Give new denture instructions	IV-61
				32. Preserve and mail biopsy specimen and checklist	IV-62
				33. Assist in administering first aid and checklist	IV-64
				34. Dismissing the patient and checklist	IV-66
				35. Practice patient and operatory safety measures for X-radiation	IV-68
				36. Clean X-ray processing equipment and prepare developing solutions and checklist	IV-69
				37. Adjust voltage, amperage, and timer on X-ray machine	IV-71
				38. Expose interoral radiographs using a long-cone and paralle1 technique and checklist	IV-72
				39. Develop and fix exposed radiographic film and checklist	IV-75
				40. File dental radiographs	IV-78
				41. Care for preliminary or final impressions	IV-79
				42. Pour, trim and articulate casts and checklist	IV-80
				43. Pour, trim and articulate casts and checklist	IV-83
				44. Inspect dental laboratory equipment for proper use and maintenance	IV-85
				45. Maintain dental operatory equipment	IV-87
				46. Clean dental laboratoy instrument	IV-88
				47. Clean dental lathe	IV-89
				48. Clean dental operatory equipment (handpieces) and checklist	IV-90
				49. Clean dental operatory equipment (entire unit) and checklist	IV-92
				50. Clean laboratory bench engine	IV-94
				51. Clean model trimmer and checklist	IV-95

PROCEDURE INVENTORY FOR CURRICULUM DEVELOPMENT

Manual Content Evaluation				Procedures	
Add	Delete	Change	OK	Section IV: Dental Assistant Continued	Page
				52. Clean and maintain dental instrument	IV-97
				53. Prepare instruments for sterilization	IV-98
				54. Disinfect instruments using chemical disinfectant and checklist	IV-99
				55. Sterilize instrument in a dry heat sterilizer and checklist	IV-101
				56. Autoclave and checklist	IV-103

PROCEDURE INVENTORY FOR CURRICULUM DEVELOPMENT

Manual Content Evaluation				Procedures Section V: Medical Assistant	Page
Add	Delete	Change	OK		
				1. Measure and record temperature	V-1
				2. Measure and record pulse (radial, temporal, femoral, carotid, pedal)	V-4
				3. Measure and record blood pressure	V-5
				4. Perform visual acuity test (Snellen Charts) and checklist	V-6
				5. Position and draping patient	V-8
				6. Assist with dressing change	V-9
				7. Assist with the collection of pap smear and checklist	V-10
				8. Clean instruments	V-12
				9. Disinfect instruments	V-13
				10. Unwrap or open sterile packages maintaining sterility of contents	V-14
				11. Package linens or instruments for sterilization	V-15
				12. Sterilize supplies and instruments using the moist heat method and checklist	V-16
				13. Sterilize supplies using the dry heat methods and checklist	V-18

VII-9

PROCEDURE INVENTORY FOR CURRICULUM DEVELOPMENT

Manual Content Evaluation				Procedures Section VI : Medical Laboratory Assistant	Page
Add	Delete	Change	OK		
				1. Assist with the collection of a random urine specimen	VI-1
				2. Assist with the collection of clean catch or sterile urine specimens and checklist	VI-2
				3. Collect a 24-hours urine specimen	VI-5
				4. Check urine using Keto-diastik	VI-6
				5. Test urine for sugar and acetone	VI-7
				6. Check urine using test-tape	VI-8
				7. Assess and record color, gross appearance, and odor of urine specimen	VI-9
				8. Perform urine specific gravity tests	VI-10
				9. Perform routine biochemical urine tests	VI-11
				10. Prepare urine specimen for microscopic examination	VI-12
				11. Assist physician with mocroscopic urinalysis	VI-13
				12. Obtain a capillary blood specimen	VI-14
				13. Perform hemotocrit test	VI-15
				14. Perform fingerstick blood sugar screening test (Dextrostix)	VI-16
				15. Stain blood smears and checklist	VI-17
				16. Collect eye, nose, and throat specimens for culture and sensitivity	VI-19
				17. Perform white blood cell count	VI-20
				18. Assist with the collection of microorganism smear and checklist	VI-22
				19. Stain microbiological smear	VI-24
				20. Tests stool specimens for occult blood using commercial slide	VI-25
				21. Collect and label sputum specimen	VI-26
				22. Collect and label stool specimen	VI-27

APPENDIX B

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